

WELCOME TO TUITION EXCHANGE

A product of Tuition Exchange and available for TE Liaison Officer member use only.

May 25, 2023

Table of Contents

TUITION EXCHANGE (TE) HANDBOOK	5
General Contact information	6
INTRODUCTION TO THE TUITION EXCHANGE PROGRAM	7
History	7
Membership	8
UNIVERSAL AND INSTITUTIONAL RULES	9
Fundamental Principles	9
Appoint a responsible employee	9
Institutional Policies	10
A TYPICAL PATH TO A TE SCHOLARSHIP	11
ROLE OF THE TELO	13
Introduction	13
Summary of Responsibilities of TELOs	13
Disclaimer	14
OVERVIEW	15
Inform Employees	15
Offer Timely Advice to Exports	15

Guide Exports through the Application Process	16
Field Inquiries from Imports	16
ADMINISTRATION OF SCHOLARSHIPS FOR EXPORT STUDENTS	18
OVERVIEW	18
Certification	19
Annual Re-Certification	20
WITHDRAWAL OR TEMPORARY LEAVE OF ABSENCE (LOA)	21
ADMINISTRATION OF SCHOLARSHIPS FOR IMPORT STUDENTS	22
OVERVIEW	22
Overseeing Certification	22
Excellent and Effective Practices for Exports	22
Application Review	24
OPTIONAL PROGRAM	25
Double Credit 3 (DC 3)	25
LEGAL STATUS OF TE FORMS	25
GOOD AND EFFECTIVE PRACTICES FOR IMPORTS	25
OVERSEEING THE IMPORT/EXPORT BALANCE	26

OVERVIEW	26
DC 3	26
TE Recognized Double Credit 3 Exchange Programs as of September 2022	26
DISCONTINUED TE PROGRAMS	27
The Export-Import 3	27
The TE Cooperative Program	27
COMMON PROBLEMS AND SUGGESTED SOLUTIONS	29
Too Few Import Applicants	29
Too Many Import Applicants	30
Too Few Export Applicants	30
Too Many Export Applicants	32
GOOD AND EFFECTIVE PRACTICES	33
Communicating with Other Campus Offices	33
The Enrollment Management and Admissions Office	33
The Financial Aid Office	33
Other on-campus offices	33
Communicating with another TELO	34
Communicating with TE Central	34

TE Membership Survey	35
TE Enrollment Report*	35
Annual Membership Dues Statement	36
Balance Sheet	36
TE Participation Fees Statement	36
Suggested Time Schedule of TE Program Administration	36
GLOSSARY	38
APPENDIX A	41
Policies Governing the Administration of TE Scholarships	41
TE SUGGESTED CONSIDERATION	47
Export application details	50
Export Eligibility details:	52
Duration of TE Scholarships	55
Taxation.	56
Definition of Family Member	58
Balance Sheet Update – October 2020 from R. Bob Shorb	61

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 utilize Tuition Exchange's flexibility fully. 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.

The Tuition Exchange, Inc. (TE Central) 3 Bethesda Metro Center, Suite 700
Bethesda, MD 20814

General Contact information

Telephone: 301.941.1827

Email: info@tuitionexchange.org

Web site: www.tuitionexchange.org

Robert "Bob" Shorb, Executive Director and CEO (Recruitment) -

rshorb@tuitionexchange.org

Janet Hanson, Director of Communications (Membership Services) -

jhanson@tuitionexchange.org

Kristine Lev, Director of Administration (Finance) -

klev@tuitionexchange.org

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 offered "tuition discounts" to faculty and staff children from 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 690 colleges and universities. It has participating institutions 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 7,500 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 Report no later than September 30, reviewing the Enrollment Report 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 an 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 this 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 terminate?

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 TELOs 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 is generally a minimal addition to an administrator'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 which 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 re-certify the eligibility of "exports" annually 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 Survey.
- i) To maintain up-to-date TELO information with TE Central.

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.

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 power points, Export, and import checklists, 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 either 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 the eligible employee 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 work in partnership with the Enrollment Management Staff, the Financial Aid

Office, and Human Resources, to identify and court prospective import scholars to 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 re-certifies the eligible parents of a student receiving 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 on the Enrollment Report
- D. Students who take a one-semester Leave of Absence (LOA) are to be noted in Enrolled Students, Edit students.
 - a. Students on an LOA do not appear on the Enrollment Report, while those on an LOA
 - b. It is the responsibility of IMPORT TELOs to manage the LOA process.
 - c. Export TELOs must re-certify any eligible parent with a student on LOA before June 1 annually.

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. The TELO confirms on the application the number of semesters the student is eligible to apply (as many as eight, as few as one) and the student's class standing. 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.

Annual Re-Certification

After February 15, but before June 1, the exporting or sending TELO must ensure that the employee (parent) of the TE scholar is still eligible per that institution's requirements by re-certifying the student. The Export TELO completes the online Re-certification process. The re-certification process and funding are, in most cases, pro forma. A TE scholar may be denied re-certification 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 re-certification or renewal *for cause*. Providing Exporting and Importing eligibility guidelines to your TE scholars is essential. Often, the lack of communication is the cause of many misunderstandings. Be very clear regarding the issues of employee employment separation, termination, and retirement. Be sure to visit your Human Resource Department regarding any TE 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 the family 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 Report 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.
- C. Re-certification of eligible continuing scholars within the terms of the scholarship and conditions is virtually automatic. However, to follow FERPA rules, do not share with parents. 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.
- B. Eligibility (waiting period, employment status, status of new hires with eligibility from former employer) 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 notifications. 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 be valid until May 1, the national accepted student candidate's reply date. The monetary value of the scholarship awarded should be shared by completing the online form. 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 counter-productive and unnecessary because it is difficult to forecast how many applicants will enroll accurately. 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, the TE Re-certification & Funding Form, and the TE Membership Agreement are legal contracts. TELOs should bear this in mind while carefully and accurately completing these forms. Although the TELO may delegate to other staff members such duties as requisitioning forms or verifying enrollment, these forms must bear the approval of the designated TELO. The documents should specify the term and amount of the scholarship and any particular limitations that apply.

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. Institutions are ethical, 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. Good and Effective Practices
- C. DC 3 The TE Board of Directors adopted Double Credit 3 (DC 3) at the June 2014 annual meeting.

DC 3 offers TE semester credit on the TE balance sheet for up to three students annually who have been 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 provides TE member schools to meet the minimum annual TES offers 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 (XPCIC)
2. Council for Christian Colleges and Universities (XPCCCU)

3. Catholic College Cooperative Tuition Exchange (XPCCCTE)
4. Association of Jesuit Colleges and Universities (XPAJCU)
5. Evangelical Lutheran Churches in America (XPELCA)
6. Associated Colleges of the South (XPACS)
7. Great Lakes Colleges Association (XPGLCA)
8. Associated Colleges of the Midwest (XPACM)
9. Association of Presbyterian Colleges and Universities (XPAPCU)
10. Associated Colleges of the Twin Cities (XPACTC)
11. International Association of Baptist Colleges & Universities (XPIABCU)

If your School participates in an exchange program not listed above, please provide information to Janet (jhanson@tuitionexchange.org) for consideration.

On the Enrollment Report, the program and the School are matched. Please remember that XP allows the DC 3 option to be grouped in the listing. Be sure to use the generic student ID of 5555.

- 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.

There is a cost to the option – it is the annual per-student Participation Fee. Billing occurs with the submission of the Enrollment Report.

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 is 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 as long as they meet all financial obligations and do 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.

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 to your admissions application about the parent's place of employment.
- C. Investigate continuing and incoming students. If one of your students has a parent employed at a member school, ask them 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. (Mailing labels for this purpose are available from TE Central.)
Target feeder schools, TE schools, or all regional schools.
- F. Host a gathering for TELOs in the region to introduce your institution.
- G. Use the TE website to communicate with other TE members.

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 highly competitive admissions of the school. To select among candidates, most institutions either:

- A. Ask the Enrollment Management staff to rank order 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. Often this approach 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 that 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 may also provide substantial assistance to the TELO. The Human Resources Office confirms employee eligibility and may also help to 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 balance 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 - are established by every member to define the qualifications an employee must meet to be eligible to participate in the TE program.

Enrollment 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 - the institution's balance between semester units for imported students and semester units for exported students.

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 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 that charge higher tuition are permitted to award TE scholarships for less than the full amount of their tuition but not less than the set Rate for the academic year.

Restriction – the institution has not met its financial obligations or has excessive exports and minimal imports as determined by a TE Central review. 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: 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.

TE Codes – TE Central and TELO designations to identify each institution. The unique codes avoid confusion caused by member institutions with the same name and streamline the database processing of institutional records.

TELO – 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 those 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 providing 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. The Admissions Deposit must be received by May 1 for the TE award to be considered firm.
 - ii. If offered a TE award later, the student is offered 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 re-certified. 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. Should the FAFSA application not be 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 in the case of a student garnering 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.

14. _____ provides TE import students with a free double room credit. This double room credit is available when the TE import resides in

_____ residence hall. If the student prefers a single room, the room credit covers the cost of a double room. The student is responsible for any additional housing costs above _____ per semester/year, including the annual room deposit.

a. Students residing on campus must select an on-campus dining option. The room credit covers only the cost of a double room.

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 responsibility of the family 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.

All 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. In the case of both parents working for _____, provided the other parent is eligible (see item 2 in the Export application details section), the TE-awarded student will retain their eligibility.

c. 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 each employee 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 their TE scholarship award amount. 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 that charge higher tuition. These members have the option but are not required to award TE scholarships for less than the full 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 special 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 to its members that all categories of employees be declared eligible for the TE program. Check out the [IRS website, Publication 970](#), for specific information.

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 the administration of the campus TE program. It protects the TE member school against unanticipated conflicts, and it protects 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 speak to 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 discusses mitigating circumstances like employees who cease being eligible employees 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 benefit of employment, like health insurance or a pension program. It may help the institution avoid future disappointment and even conflict if its written policies explain this.

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. Students who have been approved and accepted, and those who have enrolled, 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*. Such as years employed by the institution, uninterrupted vs. interrupted employment, 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.

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.

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

Standards for Admittance - **New candidates** applying for TE scholarships must meet the admissions criteria for the institution. They may have to meet more demanding standards if the institution has instituted these to select among 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, and the TE Annual Reports filed with TE Central, and the TE Certification & Application Forms. 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. It is important that the guidelines offer TE candidates clear guidance on these points since students for whom financial aid is a necessity 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 the 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 reimagined, 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
rshorb@tuitionexchange.org