Employee Tuition Assistance Program

September 15, 2022

Today’s agenda

› Available Programs at Southwestern
› Eligibility Criteria
› Application Processes and Timelines
› Questions
Types of Programs

- Faculty/Staff Scholarship
- Tuition Exchange Programs
  - Associated Colleges of the South (ACS)
  - Council of Independent Colleges (CIC)
  - Bi-Lateral Tuition Exchange
  - Tuition Exchange, Inc. Scholarship (TEI)

Faculty/Staff Scholarship

- Scholarship for an eligible employee, dependent or spouse to attend SU
- Scholarship covers up to full-time tuition
- Supersedes all other SU scholarships
- Employee covers room/board/book expenses
- Charley Ray Book Scholarship available for employees in the Facilities Management Dept.
Faculty/Staff Scholarship

- Funded by the Grace Pate Downs Endowment Scholarship Fund
- May be used for Fall and Spring semesters
- Renewal Requirements:
  - Employee: maintain a benefit-eligible status
  - Student: maintain satisfactory academic progress
  - May be used for up to 135 credits (including transfer credits)

Tuition Exchange Programs

- Four programs: ACS, Bilateral, CIC, TEI
- It is a scholarship
- Two steps to receiving a T/E Scholarship:
  1. SU certifies employee eligibility
  2. Importing school decides whether to award a T/E scholarship. It is not automatically awarded.
Tuition Exchange Programs

- Covers up to tuition at participating colleges
- Employee covers room/board/book expenses
- Import/export balance requirements
- Renewal requirements:
  - Employee maintains eligible employment status
  - Student meets renewal criteria as set by the importing school
  - SU will certify up to 8 semesters per student

ACS Tuition Exchange
- 15 participating institutions
- Annual participation fee: $4,000
- SU pays $2,000, employee pays $2,000
- Balance maintained through “net exporter” fees
- www.colleges.org

Bilateral Tuition Exchange
- Active agreement with Austin College
- No participation fee or balance requirements
- www.austincollege.edu
Tuition Exchange Programs

- **Council of Independent Colleges (CIC)**
  - Over 400 participating schools
    - Not all CIC member schools participate
    - [www.cic.edu](http://www.cic.edu) → TEP Program → Searchable list of Participating Institutions
  - Unlimited exports, SU must offer 3 imports

- **Tuition Exchange, Inc. Scholarship (TEI)**
  - Over 600 participating institutions
    - [www.tuitionexchange.org](http://www.tuitionexchange.org)
  - Scholarship amount may be:
    - Up to full tuition charges or
    - Up to the “Set Tuition Rate” established
    - Some schools award housing costs
Tuition Exchange Programs

Tuition Exchange, Inc. Scholarship (TEI)
- Unlimited exports, SU must offer 3 imports
- Import/Export balance monitored
- Exports or imports may be restricted by SU to prevent a significant imbalance
- When exports need to be restricted, employment longevity will be used to determine ranking
- Wait list will be used

What determines scholarship eligibility?
- Importing school sets award criteria
- Influencing factors
  - Import/Export balance requirements in each program
  - Number of tuition exchange applicants
  - Profile of student
Employee Eligibility Criteria

- Faculty/Staff Scholarship, ACS Tuition Exchange, Bi-Lateral Tuition Exchange, CIC Tuition Exchange – must have at least one year of service.
- Tuition Exchange, Inc.
  - If hired prior to or on February 9, 2005 – must have at least one year of service
  - If hired after February 9, 2005 – must have at least three years of service

Application Process

- Complete and submit a Tuition Assistance Application to Financial Aid Office
- September 30, 2021 deadline for employees with a current HS sophomore or junior.
- Employees with a current HS senior should have already applied
- Application available at: Human Resources website → Employee Benefits → Fringe Benefits → Employee Tuition Assistance
Application Process

› Supporting documentation required to show student’s dependency status

› Application forwarded to Human Resources to determine:
  ◦ Eligibility status
  ◦ Employment longevity

Additional steps: Faculty/Staff Scholarship

› Submit SU application for admission by appropriate deadline

› Complete FAFSA by March 1 of the senior year
  ◦ FAFSA Available October 1

› Upon gaining admission, FA sends F/S award letter
Additional steps: Tuition Exchange Programs

- Attend a College Search Workshop
- Search T/E websites for participating colleges
- Submit admission apps by deadlines
- Apply for additional financial aid if needed
- Understand scholarship “stacking” policies
- Ask about college’s status
  - How many awards can be made?
  - Additional eligibility/renewal criteria

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Tuition Exchange Process

- Employee submits Tuition Assistance Application
- Financial Aid Office requests copy of latest tax return.
- Application routed to HR to confirm eligibility
- Status notification sent to employee in early Fall
- List of colleges requested from employee, due by September 30
- SU sends certifications to importing colleges beginning October 1
Student must gain admission to importing college

If awarded, importing college notifies student and SU in writing

Importing college determines if scholarship will be awarded to an admitted student

Process simultaneously repeated for each school indicated by the employee

Student makes final college choice and notifies the importing college AND the Fin Aid Office at SU

Fin Aid Office will go to waiting list if spaces become available
Questions?