



SOUTHWESTERN UNIVERSITY

# 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



## Tuition Exchange Programs

- ▶ 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](http://www.colleges.org)
- ▶ Bilateral Tuition Exchange
  - Active agreement with Austin College
  - No participation fee or balance requirements
  - [www.austincollege.edu](http://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 Programs

- ▶ 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



## Tuition Exchange Programs

- ▶ 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



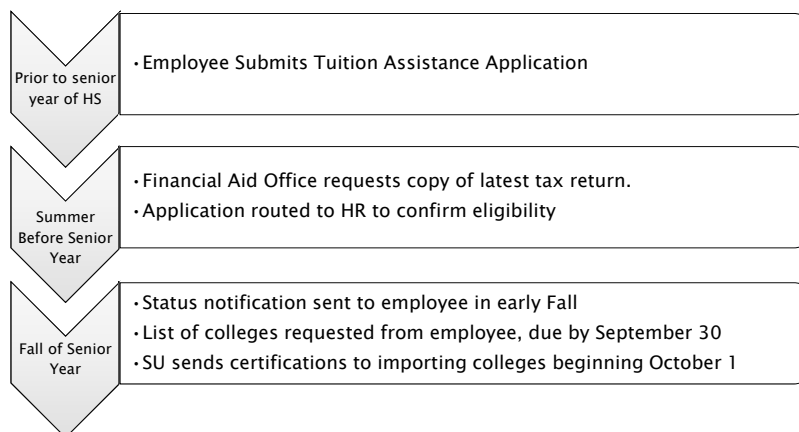


## Additional steps: Tuition Exchange Programs

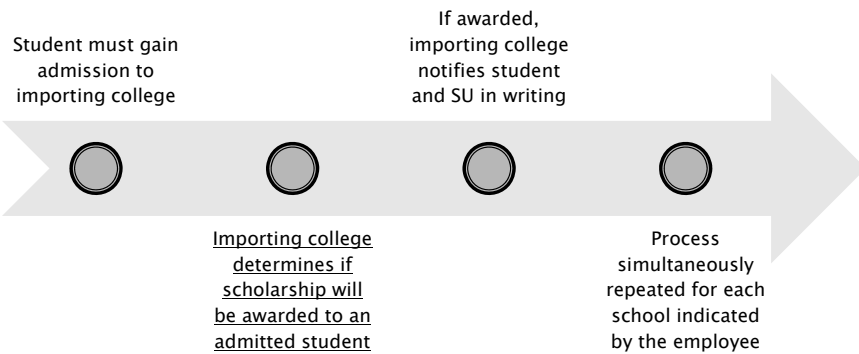
- ▶ Attend a College Search Workshop
- ▶ Search T/E websites for participating colleges
- ▶ Submit admission apps by deadlines
- ▶ Apply for additional financial aid if needed
- ▶ Understand scholarship “stacking” policies
- ▶ Ask about college’s status
  - How many awards can be made?
  - Additional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



## Tuition Exchange Process



# Tuition Exchange Process



# Tuition Exchange Process

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?