Norwich University
Tuition Exchange Benefit - Frequently Asked Questions

1. Who is eligible to apply for a tuition exchange scholarship? Faculty and staff members who have five years of continual university service are eligible to apply for a slot for their dependent to attend a college or university that is a member of the Tuition Exchange Program (TEP). The current listing may be found at: www.tuitionexchange.org. Please note that this exchange is based on a formula of imports and exports and slots available are determined by this formula. There is no guarantee that your dependent will be offered a slot if the ratio of imports and exports are not in balance.

Norwich also has a membership with the Council of Independent Colleges (CIC) which provides a tuition exchange scholarship to applicants on a more relaxed basis. The current listing of members schools maybe be found at: www.cic.edu. There is no requirement for university service years and acceptance is determined by the receiving school.

2. How many students are eligible each year? The number of eligible students varies each year. For the TEP, Norwich must keep a certain balance of students it is importing with the number of exports. The CIC structure allows an unlimited number of students to apply, but the number accepted is determined by the receiving school, which is required to accept a minimum of three applicants per year.

3. How are awards determined? The TEP benefit award through Norwich is based on the seniority of the faculty or staff member, the number of exports allowed due to the formula, and whether or not that employee has previously received an award. It is the responsibility of the applicant to apply and be accepted at the receiving school in accordance with their admission procedures.

The CIC applications are forwarded to the appropriate web site and the receiving school determines an award based on their own import standards.

4. What is the schedule? An application must be provided to the Student Financial Aid office no later than September 30. A decision will be made by October 31 for eligibility for the TEP and CIC programs. A waiting list may be determined at this time. By January 1 the applicant will be contacted by HR to confirm that they will accept a tuition exchange if offered; if not the benefit will be offered to applicants on the waiting list or the waiting list will be released.

Please note: this benefit is not guaranteed. Notification and confirmation will be sent from the receiving school sometime between March and the end of May,
depending on the school’s schedule for awarding financial aid. This time line in regard to Norwich’s role has been outlined to assist faculty and staff in their planning for their dependent’s education.

5. What is the value of the tuition exchange benefit? This is determined by the receiving school with guidelines that may be found on the TEP and CIC web sites.

6. If a tuition exchange is not awarded, may the employee apply in a subsequent year? Yes, following the same deadlines and criteria listed above.

7. Can a student on a faculty exchange here at Norwich study abroad? The depending factor in this case evolves around Norwich’s relationship with the study abroad program chosen. For example, if the student participates in a program where they would ordinarily pay Norwich for tuition, the study abroad will be approved; however, if the student participates in a program where they would ordinarily pay the program directly, the study abroad will not be approved.

Other comments: as noted, this employee benefit is dependent on many factors and employees are not guaranteed its receipt. When applying for admission, your family should consider applying for other financial aid and scholarships that the school may offer.

There are two sides to this process – the Norwich’s and the receiving school. Norwich does have to approve and confirm eligibility and forward approved applications to the appropriate sites for consideration. The receiving school also has to approve the benefit, as well as offer enrollment to the student. Timing of these events are subject to change, and are at the discretion of each entity.

The tuition benefit provided for dependents at Norwich should also be considered as your student begins his or her search for a higher education program that is suited to their interests.
Norwich University Human Resources
Tuition Exchange Benefit Checklist

☐ Visit the HR forms page for information related to tuition benefits in the spring or early summer prior to submitting an application. Contact HR (Ext. 2084) with any initial questions regarding the process.

☐ Research the Tuition Exchange Program (TEP) and Council of Independent Colleges (CIC) web sites for information on member schools.

    Web sites:  www.tuitionexchange.org and www.cic.edu

☐ Seek application and admission materials from desired schools, including Norwich University.

☐ Attend a tuition exchange informational meeting as scheduled – late August or early September – scheduled date to be determined and posted on my.norwich.edu

☐ Complete and return appropriate application(s) for tuition exchange to Tracey Mingo, Director of Student Financial Aid, no later than September 30 for the TEP. Please note: the CIC requires separate forms for each institution. There is no specific deadline for the CIC, however, we encourage you to complete the paperwork in the early fall.

☐ Complete the Proof of Dependency form.

☐ October 31 - notification of status and ranking.

☐ January 1 – if offered, determine whether you will accept the benefit or not. Keep in mind that the final determination is made by the receiving school and its admissions and financial aid process. Final notification and confirmation will occur between March and the end of May.
Tuition Exchange Program—Participation Form
For enrollment during the 20___-20___ academic year

Part I: To be completed by the exporting institution

Exporting Institution: ____________________________________________________________
Exporting Liaison Officer’s Name: _________________________________________________
Title: ________________________________________________________________________
Tel: ________________________________________________________________________ Email: _______________________________________________

Importing Institution: ____________________________________________________________
Importing Liaison Officer’s Name: _________________________________________________

Student Name: ________________________________________________________________ S.S.N.: ____________________
Student Address: __________________________________________________________________

This applicant is (check one):  □ New at importing institution
□ Presently a student at importing institution, but is not a CIC-TEP participant
□ Presently in CIC-TEP program at importing institution (renewal applicant)

□ The student named above is eligible for CIC Tuition Exchange Program benefits. Please notify my office as soon as possible whether this applicant can be included in your CIC-TEP.

Signature of Exporting CIC-TEP Liaison Officer: ________________________________ Date: __________________

Part II: To be completed by the importing institution

Check one box:  □ I am pleased to report that the above-named student can be included in our CIC-TEP.
□ I regret that we will be unable to include this student in our CIC-TEP.

Importing Liaison Officer’s Name: _______________________________________________
Title: ________________________________________________________________________
Tel: ________________________________________________________________________ Email: _______________________________________________

Signature of Importing CIC-TEP Liaison Officer: ________________________________ Date: __________________

Application Procedures:
1. Once the student has been determined eligible for the CIC-TEP benefit, the Liaison Officer of the exporting institution should send a copy of this form to the Liaison Officer of the importing institution.
2. The importing institution should notify the exporting institution of its acceptance or rejection of the applicant as soon as possible by returning one copy of this form to the exporting institution.
3. A copy of this form should be retained by the importing institution.
4. Do not send a copy of this form to the Council of Independent Colleges.

Questions concerning the CIC Tuition Exchange Program should be directed to:
Council of Independent Colleges • One Dupont Circle, NW, Suite 320 • Washington, DC 20036-1142
Tel: (202) 466-7230 • Fax: (202) 466-7238 • Email: eclark@ci.nche.edu • www.cic.edu
Application for the Tuition Exchange Program

I hereby request certification of my child to the institutions listed below as an applicant for a scholarship under the Tuition Exchange Program. I am eligible for employee benefits at Norwich University, and I understand the policies governing this program. I have read the dependency requirements on the reverse and certify that my child does meet the requirements for dependency.

________________________________________________________________________   ____________
Employee Signature                                    Date

Please provide the following information:

Academic Year Applying for:____________________________________________________

Student First Name:__________________________________________________________

Student Last Name:___________________________________________________________

Last four digits of Student SSN:______________________________________________

Student e-mail:______________________________________________________________

Telephone:________________________________________________________________

Permanent Address:________________________________________________________________

Parent/Guardian Name:________________________________________________________

Parent e-mail:________________________________________________________________

Parent date of hire at Norwich:_______________________________________________

Number of Academic Years Applying for:_______________________________________

Number of Semesters Applying for:____________________________________________

Class Year in College of Student:_____________________________________________

List participating schools where student will apply: (Please do not abbreviate college names)

College(s) Name(s)                        State College Located In:
__________________________________________
__________________________________________
__________________________________________
__________________________________________

Return Application to Tracey Mingo, Student Financial Planning Office, no later than September 30
Proof of Dependency

This form must be completed by all employees applying for a tuition exchange program offered by Norwich University. A tuition exchange is only available to children who are legal dependents of eligible employees. The IRS applies five tests to determine if an individual qualifies as a taxpayer’s dependent. All of these conditions must be met to qualify as a dependent.

1. Relationship. The person must be the taxpayer’s relative, e.g., child, mother, father, grand-parent, great-grandparent, brother, sister, grandchild, great grandchild, half-brother or sister, step-brother or sister, stepmother or father, mother or father-in-law, brother or sister-in-law, daughter or son-in-law, uncle, aunt, nephew, or niece; or have lived in the employee’s home as a member of the family for the whole year.

2. Married person. If the person is married and files a joint return, the taxpayer cannot claim him or her as a dependent unless the joint return was filed only to get a refund of all taxes withheld.

3. Citizen or resident. To be claimed as a dependent, the person must be a citizen or resident alien, a resident of Canada or Mexico, or an alien child adopted and living for the entire year with a U.S. citizen in a foreign country.

4. Income. The person’s gross income must be less than $2,500 unless the dependant is a child (e.g., son, daughter, stepson, stepdaughter, adopted child, or foster child) who is under age 19 or a full-time student (i.e. enrolled as a full-time student for at least five months during the year) under 24.

5. Support. The dependent must have gotten more than half his or her support from the taxpayer/employee.

In order to process the tuition scholarship application for your child, please sign below to certify whether he or she meets the above requirements for dependency.

I certify that my child, ____________________, (does) (does not) meet the requirement for dependency.  

______________________________ __________________________
Employee Signature Date

______________________________ __________________________
Print Name Date of Hire
Norwich University
Tuition Exchange Scholarship Program Policy
July 31, 2008 INTERIM

Norwich University participates in two programs that provide tuition scholarship opportunities for dependent children of eligible faculty or staff members at participating institutions. The programs are limited to undergraduate programs only.

Council of Independent Colleges Tuition Exchange Program (CIC-TEP)

This program includes over 350 colleges and universities throughout the United States. Each participating institution is required to provide three scholarships per year for students from participating schools. There is no limit on the number of dependents of our faculty or staff members attending other institutions.

This program is available to all dependent children of employees who are eligible for tuition scholarships at Norwich University. Non-exempt employees must have one year of service at the time of application for the program. The student must apply for admission to the participating school, and submit any required financial aid information. Any financial aid awards must be submitted to the host school. The student must also request a CIC-TEP Student Application Form from the Norwich University Financial Aid Office, which we will send to the Liaison Officer at the host institution.

The Tuition Exchange, Inc. (TE)

This program is the oldest exchange program of its kind in the United States, and includes over 580 participating institutions. Norwich University's access to the program depends on a rolling five year accounting of imports and exports. If our exports exceed our imports by more than 100%, we are restricted from exporting any new students until the balance is below that level.

This document will continue our long-standing practice that eligibility for the program is limited to dependent children of employees with at least five years of benefits eligible service, and the number of exports from Norwich University may be limited in any one year. The decision on the number of exports authorized each year will be made by the Director of Human Resources, based on the balance of imports and exports as of October 1. Norwich approval for exports will be awarded based on the faculty or staff member's length of service with Norwich University, first for faculty or staff members who have not previously benefited from the program, and then for faculty or staff members who have previously had children enrolled through this program. In the case of faculty or staff members with the same employment date, any necessary selection will be made by lottery. If the number of eligible applicants exceeds the number of available awards, the remaining applicants will be placed on a waiting list. Any Norwich export awards that are not used by the original award recipients will be offered to those on the waiting list in the order described above.
Policies and Procedures for Both Programs

1. Each program has a required application form that can be obtained from the Student Financial Planning Office. Applications will be accepted each year beginning on September 1. The application deadline is September 30. The application must be filed in the academic year preceding the academic year for which the scholarship is sought. For example, the application must be submitted by September 30, 2008, for the 2009-2010 academic year.

2. To be eligible, the student must be a dependent child of an eligible faculty or staff member employed by Norwich University. “Dependent” means eligible and claimed as a dependent by the faculty or staff member for United States income tax purposes.

3. For the TE program, applications will be ranked based on the length of service of the eligible faculty or staff member, first for children of faculty or staff members who have not benefited from the program, and followed by children of faculty or staff members who have previously had any children enrolled through the program. The number of TE exports awarded each year will be determined by the Director of Human Resources based on the balance of imports and exports as of October 1. We have not needed to limit the number of awards under the TE program in most years in the past. Whenever the number of awards is limited, the remaining applicants will be placed on a waiting list. Any scholarships that are not used by the original award recipients will be offered to those on the waiting list in the order described above. Because these scholarships are dependent on admissions and tuition exchange program decisions at other institutions, final decisions on waiting list applications are likely to be made in May.

4. Students must meet the admissions requirements at the institution they are seeking to attend, and must complete all admissions procedures required by that institution. Students who are approved for the scholarship by Norwich in October will also need acceptance by the host institution. Students should notify the liaison officer at Student Financial Planning whether they intend to accept the scholarship as soon as possible after acceptance by a host institution. Students on the tuition exchange waiting list should also apply to the host institution they would like to attend in order to preserve the possibility of a scholarship. For students on the waiting list, acceptance by a host institution does not guarantee that the scholarship will be approved by Norwich University, unless a scholarship becomes available.

5. Norwich University assumes no liability for educational expenses under these programs. Parents assume financial responsibility for all charges that are not covered by these programs, which may include fees, room and board charges, and any portion of the tuition not covered by the scholarship. Norwich University assumes no responsibility for any educational expenses should either or both of these programs be suspended or terminated. Scholarship benefits under these programs are not guaranteed, and are dependent on the University’s election to continue to participate.

6. Access to these programs ends when the faculty or staff member ceases qualifying employment with Norwich University. In the event that employment ends after a term begins, the student will be
allowed to continue until the end of the term in progress. In the event that employment ends due to retirement, death, or disability, after the beginning of an academic year, the student will be allowed to continue until the end of that academic year.

7. Scholarships are provided only for undergraduate education toward an initial baccalaureate degree. Normally, the scholarship will continue for four academic years, as long as the student remains a dependent child of an eligible faculty or staff member, and makes satisfactory academic progress, and the university chooses to continue its participation in the program. The faculty or staff member must formally reapply for continuation of the scholarship each year.

8. The University retains the right to amend this policy or discontinue participation in either of the exchange programs at any time. Should the University decide to discontinue participation in either of the programs, the University will strive to allow any current scholarship recipients to complete the normal period of the scholarship under the same terms and restrictions as if the University’s participation in the programs had continued.