

Institutional Capacity as it relates to offering TE scholarships and
Your TE Policy and Procedure Manual - an overview of best practices

February, 2015
TE Webinar
Janet Dodson, presenter

Today's Focus

- ▶ Part I

- ▶ Capacity
- ▶ Offer vs Accept
- ▶ Cost vs Expense
- ▶ Continuing scholarships

- ▶ Part II

- ▶ Policy and Procedures
- ▶ Program
- ▶ Employee
- ▶ Student

Part I - Capacity

- ▶ First think in terms of volume
 - ▶ Work with Enrollment Management Team
 - ▶ Increase student diversity
 - ▶ Balance is important
 - ▶ Know institutional history
 - ▶ Number of applicants
 - ▶ Number of TE applicants
 - ▶ Number of applicants who enroll
 - ▶ Number of TE applicants who enroll
 - ▶ Retention
 - ▶ Number of TE applicants who continue to graduation
 - ▶ Number of TE applicants who don't graduate
 - ▶ Is there a pattern?
 - ▶ Academics
 - ▶ Program
 - ▶ Mis-match

Part I - Capacity

- ▶ Secondly - think in terms of price and cost
 - ▶ Work with Enrollment Management, Financial Aid and CFO (Budget manager)
 - ▶ Balance remains important
 - ▶ Facts and figures important
 - ▶ TE cost is set
 - ▶ Tuition
 - ▶ Optional Set-Rate
 - ▶ Tuition Discount Rate
 - ▶ Treat this budget item like you treat internal tuition remission
 - ▶ Move this institutional option outside of the Financial Aid and Recruitment budget

Part I - Capacity

- ▶ Finally, think about room and space
 - ▶ Work with Enrollment Management, Student Services and CFO (Budget manager)
 - ▶ Balance remains important
 - ▶ Facts and figures important
 - ▶ Tuition program cost and discount rate
 - ▶ Auxiliary Enterprises
 - ▶ Housing
 - ▶ Student fees
 - ▶ Book store
 - ▶ Positive student outcomes
 - ▶ Increased graduation rate
 - ▶ Potential decrease in student debt

Part I- Offer vs Accept

- ▶ Tuition Exchange Officer responsibilities
 - ▶ Stay informed
 - ▶ Work closely with Enrollment Management Team
 - ▶ Share information
 - ▶ Keep your application pool up-to-date

Applicants

Imports - Decision Pending				
Date	Student	SSN	Exp. Inst	Year
01/21/2015	Dodson, Jannie	1234	Tuition Exchange (The)	2015 - 2016

Exports - Decision Pending				
Date	Student	SSN	Imp. Inst	Year
01/21/2015	Dodson, Jannie K	2345	HEP	2015 - 2016
01/21/2015	Dodson, Jannie	1234	Tuition Exchange (The)	2015 - 2016

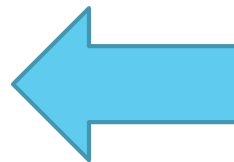
The Tuition Exchange | 3 Bethesda Metro Center – Suite 700 | Bethesda, MD 20814 | 301.941.1827 | info@tuitionexchange.org

Part I - Offer vs Accept continued

- ▶ Communication plan
 - ▶ Enrollment Management
 - ▶ New students
- ▶ TE Notification plan
 - ▶ Financial Aid
 - ▶ Be sure to keep the student's status up-to-date
- ▶ Other TE schools
 - ▶ If you delete an application - please be kind and email the affected TELO's

School Year:	2015 - 2016
Submit Date:	02/25/2015
# Schools Applied to:	1
Importing School:	TE TEST SITE Ms Testy Tester, Associate Director janetdodsonte@gmail.com 402.418.1081
Exporting School:	Tuition Exchange (The) Mr. Robert Shorb, Executive Director/CEO jdodson@tuitionexchange.org 301-941-1827
Student Name:	Muffy Hanson
Social Security Number:	1234
Student E-mail:	jdodson@tuitionexchange.org
Telephone:	402.418.1081
Permanent Address:	8 Pioneers Ct Crete, NE 68333
Parent Employment Category:	Faculty
Parent/Guardian Name:	C N Hanson
Parent E-mail:	jkhd76@gmail.com
Years of Parent Employment:	45
Total number of academic years:	4
Total number of semesters:	8
Application Status:	Approved for Admission
Class:	Freshman
Exporting Comments:	This is a test application

Decision:*	<input type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> Wait List
Tuition Offer:*	<input type="radio"/> N/A <input type="radio"/> Full Tuition of . . . <input type="radio"/> "Set Rate" amount of . . . <input type="radio"/> Other amount of . . . \$ <input type="text"/> Must be a number
Comments:	<div style="border: 1px solid black; height: 40px;"></div>



Keep this decision area up to date.

Part I - Cost vs Expense

- ▶ Tuition is the basis for revenue but...
- ▶ What is the cost of a half-full classroom?
- ▶ What is the cost of an empty bed?
- ▶ What is the average discount rate?

- ▶ Think about the increased value of a full classroom
- ▶ Think about the increased social interaction of a full residence hall
- ▶ Think about the potential for increased auxiliary income



Part I - Continuing students

- ▶ Continuing students
 - ▶ Maintenance
 - ▶ Enrollment and Academics - Registrar
 - ▶ Satisfactory Academic Progress - Financial Aid
 - ▶ Employee eligibility - Human Resources
 - ▶ TELO Recertification via Annual Report
 - ▶ Communicate with continuing student/family
 - ▶ Be familiar with your school's FERPA policy

Part II - Policy and Procedure update

- ▶ Where should information be housed?
 - ▶ Employee Handbook
 - ▶ College Catalogue
 - ▶ Student Handbook
 - ▶ TELO Manual

Part II - Policy and Procedure update continued

▶ Institutional Program

- ▶ Who is eligible? - first time undergraduate? Transfer student? Online student?
- ▶ How does your school define dependent? - IRS definition? Spouse? Partner? Employee?
- ▶ What are eligible programs at your school? - tradition program? Online program? Graduate? Terminal programs?
- ▶ When does your school accept TE applications and approve TE applications?
- ▶ How does your school communicate with TE applicants?
- ▶ Can a denied applicant appeal?

Part II - Policy and Procedure update continued

▶ Employee

- ▶ What criteria must the employee meet to be eligible?
- ▶ Will you allow the employee to participate during work time?
- ▶ When does your school acknowledge or notify employees regarding ability to participate?
- ▶ How does your school communicate with eligible TE applicants and the employee?
- ▶ Can a denied employee's application appeal?
- ▶ What happens if:
 - ▶ I retire?
 - ▶ I am a causality of reduction in force?
 - ▶ I am no longer employed by the college?
 - ▶ Something else that causes an employment separation.

Part II - Policy and Procedure update continued

▶ Student

- ▶ What credentials must the student maintain for initial consideration?
- ▶ What credentials must be the student maintain for renewal?
- ▶ When does your school acknowledge or notify the student regarding TE funding?
- ▶ Does your school require the FAFSA?
- ▶ Does your school require the student to live on campus
- ▶ What is the maximum length of a TE scholarship?
- ▶ Is there cost to participate in the TE program?
- ▶ Can a denied student's application appeal?
- ▶ What happens if:
 - ▶ My parent retires?
 - ▶ Is a causality of reduction in force?
 - ▶ Is no longer employed by the college?

TE News

- ▶ TE-GO nominations are due Friday, February 28
- ▶ Please check your Participation Fees invoice
- ▶ Review your Annual Report to confirm it is up to date
- ▶ TE 2015 Space availability service will be launched in April
 - ▶ Are your TE spots full?
 - ▶ Our webpage will detail schools with available TE awards
 - ▶ See TE 2015 Space available handout
 - ▶ Detailed information will be available in April
- ▶ March webinar topic will focus on updated TELO portal - stay tuned for further details and exact date and time
- ▶ Stay tuned for in-person training announcement



- ▶ Remember Daylight Savings Time comes to visit on March 8
- ▶ Spring arrives soon
- ▶ Thanks for all you do
- ▶ See you in March