

Tuition Exchange Program

This document supersedes the TEP information contained in the Employee Handbook and Benefits Guide

The Tuition Exchange Program (“TEP”) is a reciprocal scholarship program for dependent children of faculty and staff employed at hundreds of participating institutions of higher education, including colleges and universities in Massachusetts. The Tuition Exchange, Inc., a not-for profit organization based in Washington, D.C., runs the TEP. The goal of the TEP is to attract and retain employees in the field of higher education by making careers at colleges and universities more attractive.

TEP provides an opportunity for a dependent child of full-time faculty and staff to receive partial or full tuition scholarships for undergraduate education at one of the TEP member institutions. The member institutions include private and public institutions, research, and doctoral universities, liberal arts colleges, and specialized schools located in the United States and the United Kingdom. A list of participating institutions can be found by visiting tuitionexchange.org and clicking on “participating institutions.”

Simmons must balance the number of students it accepts with the number it sends to other schools under TEP (the “import/export” balance). If the University is out of balance (i.e., there is a significant difference between the number of imported and exported students), Simmons either cannot participate in TEP for that year or Simmons must limit the total number of “exported” students. If there is a need to limit the number of exports, Simmons will do so based on seniority (the number of years of service) of employees whose dependents have applied to TEP.

Scholarship awards are highly competitive and not automatic. There is no guaranteed placement in the TEP. Simmons retains the discretion to allocate and/or place limitations on TEP, particularly if the number of applications exceeds the number of available spaces. If demand exceeds the number of scholarships available, Simmons uses a lottery system to select which dependent children will participate in TEP. The lottery system favors children of employees with fifteen (15) or more years of service.

ELIGIBILITY

Employees who want their dependent children to apply for a TEP scholarship must meet the following criteria:

- You must be a full-time Simmons employee.
- You must have, as of the Program date, completed a minimum of four (4) years of full-time, uninterrupted service at Simmons. Your 4th year anniversary must fall on or before July 15 of the year in which your child plans to attend college. For the purposes of this policy, Simmons does not consider FMLA and military leaves of absence as breaks in service.
- You also must maintain full-time status while your dependent child attends under the Tuition Exchange Program as determined by Human Resources.
- You may only have one dependent child participating in the Program at any time.
- Your dependent child must be deemed a Qualifying Child as defined by IRS regulations to be eligible to participate in this Program. Per the IRS: In general, to be a taxpayer's qualifying child, a person must satisfy four tests:
 - **Relationship:** The taxpayer's child or stepchild (whether by blood or adoption), foster child, sibling or stepsibling, or a descendant of one of these.
 - **Residence:** Has the same principal residence as the taxpayer for more than half the tax year. Exceptions apply, in certain cases, for children of divorced or separated parents, temporary absences, and for children who were born or died during the year.
 - **Age:** Must be under the age of 19 at the end of the tax year, or under the age of 24 if a full-time student for at least five months of the year, or be permanently and totally disabled at any time during the year.
 - **Support:** Did not provide more than one-half of their own support for the year.
- If a child is claimed as a qualifying child by two or more taxpayers in a given year, the child will be the qualifying child of:
 - the parent;
 - if more than one taxpayer is the child's parent, the one with whom the child lived for the longest time during the year, or, if the time was equal, the parent with the highest AGI;
 - if no taxpayer is the child's parent, the taxpayer with the highest adjusted gross income (AGI).

Additional IRS rules may apply. Please refer to the IRS website, [irs.gov/index.html](https://www.irs.gov/index.html), for further details.

APPLICATION PROCESS

In order to initiate the TEP application process, the employee must complete a Simmons Tuition Exchange Certification form.

TEP applications are processed approximately at the same time as admissions materials. This means that eligible employees should apply for a TEP scholarship about one year before the dependent plans to enroll in college.

The dependent child must apply for admission to the member institution according to the admissions procedures of the institution. They must be accepted through the regular admissions process and awarded the Tuition Exchange Scholarship by that institution.

Each participating institution sets its own policies and procedures for awarding TEP scholarships; Simmons does not control this process.

TEP LIAISON OFFICER

At Simmons, the TEP Liaison Officer is the Director of Student Financial Services. The employee should contact the Director of Student Financial Services to obtain specific information about the application process and answers to any questions about TEP (amy.staffier@simmons.edu or 617-521-3866).

If you require additional assistance, please contact the Human Resources Department at 617-521-2084.