Quick Links (Click the link below to jump to that section of the document)

TUITION REMISSION SCHOLARSHIPS AT PUGET SOUND
NATIONAL TUITION EXCHANGE (TE) SCHOLARSHIPS
NORTHWEST INDEPENDENT COLLEGES (NIC) TUITION EXCHANGE SCHOLARSHIPS
NORTHWEST LIBERAL ARTS (NWLA) TUITION SCHOLARSHIPS
OPEN TUITION SCHOLARSHIPS
GENERAL QUESTIONS

1. What scholarship programs are currently offered to Puget Sound faculty and staff?
   There are several scholarship programs currently offered through Puget Sound’s education benefits program and the availability under each program differs as described later in this document.

   a) Tuition Remission Scholarships at Puget Sound
   b) National Tuition Exchange (TE) Scholarships
   c) Northwest Independent Colleges (NIC) Tuition Exchange Scholarships *
   d) Northwest Liberal Arts (NWLA) Tuition Scholarships
   e) Open Tuition Scholarships

   *Important Note: After the application period for fall 2015, no new scholarships will be granted under the Northwest Independent Colleges Tuition Exchange Scholarship Program. For more information, refer to the NORTHWEST INDEPENDENT COLLEGES (NIC) TUITION EXCHANGE SCHOLARSHIPS section of this FAQ document.

2. Who can apply for scholarships?
   Faculty and staff working at least three-quarter time can apply for scholarships for themselves, and for their spouses, partners, and/or dependent children. See below for additional information on eligibility requirements and limitations related to each scholarship program.

3. What’s the difference between a tuition remission program, a tuition exchange program, and a tuition scholarship program?
   Puget Sound offers tuition remission scholarships, in which eligible faculty and staff, and their spouses, partners, and dependent children, may attend Puget Sound for reduced or no tuition.

   Tuition exchange programs offer scholarships based on a balanced exchange of students between participating institutions. Tuition exchange scholarships are not guaranteed and availability is based on such factors as exchange balances, admission requirements (as is the
case with remission), and in some cases competitive selection processes. There is no school-to-school transfer of money for a tuition exchange scholarship.

**Tuition scholarship programs** are scholarships at other institutions of higher education for which Puget Sound directly sends money to the other institution to pay for the scholarship.

4. **How do I decide which scholarship to apply for? Can I apply for more than one?**
   Eligible faculty and staff and their spouses, partners, or dependent children, may apply for a Puget Sound tuition remission scholarship once eligibility requirements have been met. Dependent children may apply for any available scholarship program after eligibility requirements have been met and may then select one scholarship from those that are available and offered. A dependent child may only use one type of education benefit at any one time.

For information about eligibility requirements, refer to [this website](#).

**TUITION REMISSION SCHOLARSHIPS AT PUGET SOUND**

This program is for those who wish to take classes at Puget Sound and meet the following criteria:

**Faculty and staff members.** Those working at least three-quarter time and who apply to and are admitted to the university through the regular admission process are immediately eligible for this scholarship, which covers 100 percent of class tuition. The scholarship does not cover non-tuition expenses.

**Faculty and staff members’ spouses/partners and dependent children** may apply for the scholarship if the faculty/staff member is working at least three-quarter time and after the faculty/staff member meets eligibility requirements. Spouses, partners, and dependent children must apply and be admitted to the university. The scholarship does not cover non-tuition expenses.

**Are there limits on the scholarships available through the Tuition Remission Scholarship Program at Puget Sound?**
No, under current policy there is not a limit to the number of tuition remission scholarships offered at Puget Sound for faculty and staff members and their spouses or partners. Dependent children are eligible to receive tuition remission scholarship for up to 34 units of coursework, or the attainment of their first baccalaureate degree, whichever comes first. All candidates for tuition remission scholarships are subject to standard admission requirements.
NATIONAL TUITION EXCHANGE (TE) SCHOLARSHIPS

_Tuition Exchange, Inc._ is a non-profit association of more than 600 colleges and universities of which Puget Sound has been a member since 1954. This association enables a reciprocal scholarship program among participating institutions. The employing institution certifies eligibility and the receiving institution determines the number and criteria for award decisions. Dependent children of a faculty/staff member who meets eligibility requirements defined on this website may apply for TE Exchange scholarships.

**Are there limits on the number of scholarships available through the TE Exchange?**

Yes, scholarships under this program are subject to exchange balances and there can be more applications to some schools than the number of scholarships available. As indicated on the TE Exchange website, “Tuition Exchange Scholarships are competitive and are not guaranteed.” Each participating institution determines how many scholarships they will award each year.

Participating institutions are obligated under the agreement to maintain a balance between students sent and received as part of the exchange program. Member institutions are restricted from offering new scholarships to dependents of Puget Sound faculty and staff if the number of students sent exceeds the number received by 2-to-1 over a five-year period. For example, over the course of five years, 20 Puget Sound dependents can receive scholarships at participating colleges (exports), as long as Puget Sound provides scholarships to at least 10 dependents from other participating colleges (imports). Note that while Puget Sound may offer scholarships to dependents from other colleges, the scholarship offer only counts if the students accept the offer of admission from Puget Sound.

**What is Puget Sound’s current status in the national TE Exchange?**

As of fall 2013, the university has a positive balance under this program (110 export semesters over the past five years to 133 import semesters, or a ratio of .83-to-1).

**If a dependent child applies for a scholarship through the TE Exchange, is it certain that he/she will receive a scholarship if admitted?**

No, the receiving institution may limit the number of scholarships in any given year as they manage their exchange balances and their budgets. Tuition Exchange Scholarships are competitive and are not guaranteed. The receiving institution (i.e. the institution your child applies to) sets the number of scholarships to be granted in any given year and the criteria for their award decisions. These scholarships are competitive awards. As such, dependent children are not guaranteed an award. The probability of receiving an award varies by institution; there is helpful information on the TE Exchange website about participating institutions’ percentage of award offers made to TE Exchange candidates. TE Exchange scholarships, if granted, may be limited to fewer than eight semesters of support, or limited to freshmen or some other classification of student. The amount of scholarship might be less than full tuition. The 2014-15 scholarship
amount, established by TE Exchange as the minimum scholarship for high-tuition institutions (such as Puget Sound), is $32,500 (and the 2015-16 set tuition amount will be $33,000).

Information on policies and practices at specific institutions is available at www.tuitionexchange.org.

NORTHWEST INDEPENDENT COLLEGES (NIC) TUITION EXCHANGE SCHOLARSHIPS

NIC Exchange is an agreement among the five northwest independent liberal arts colleges (Puget Sound, Lewis and Clark, Reed, Whitman, and Willamette) through which eligible faculty or staff member’s dependents may apply for tuition exchange scholarships after the faculty/staff member meets eligibility requirements defined on this website.

Are there limits on the scholarships available through the NIC Exchange? This program is governed by a formal agreement, which will sunset after fall 2015, as described later in this document, and no new scholarships will be provided after that time. In the meantime, scholarships are not guaranteed. The agreement includes limits on the number of students granted scholarships at Puget Sound in relation to the number of our own dependent children who are granted scholarships at other participating colleges.

What is Puget Sound’s current status with each of the other four NIC Exchange colleges? Puget Sound’s current exchange differentials and resulting restrictions are located here.

Are there any other scholarships available if my dependent child is interested in a college that is unavailable through the NIC Exchange? Your dependent child could apply and compete for a TE Scholarship from Lewis & Clark and Willamette, both of which are participating members of the TE Exchange (Reed and Whitman are not). Additionally, dependent children of faculty/staff member meeting eligibility requirements may apply for a NWLA Tuition Scholarship or an Open Tuition Scholarship.

NORTHWEST LIBERAL ARTS (NWLA) TUITION SCHOLARSHIPS

NWLA Tuition Scholarships provide scholarships to dependent children (of eligible faculty and staff hired before July 1, 2012) attending Lewis & Clark, Reed, Whitman, and Willamette in the amount of up to 75 percent of Puget Sound’s tuition. Eligibility requirements are more clearly defined here.

When is this benefit effective? This benefit was effective beginning July 1, 2012.
What is the waiting period for this benefit?
The waiting period for this benefit depends on the date on which an eligible faculty or staff member was hired or rehired by the university, as described below:

- Hired before July 1, 2011: After two years of employment
- Hired July 1, 2011 to July 1, 2012: After five years of employment
- Hired after July 1, 2012: Not eligible

Can my dependent child use this benefit for an occasional course?
To be eligible for this benefit, the dependent child must be registered as a full-time, degree-seeking student.

OPEN TUITION SCHOLARSHIPS

Open Tuition Scholarships provide scholarships to dependent children to any accredited institution of higher education, with the scholarship amount graduated based on years of service. Eligibility requirements are clearly defined on this website.

When is this benefit effective?
This benefit was effective beginning July 1, 2012.

What are the scholarship amounts available during FY2014-15?
The tuition scholarship benefit is graduated based on length of service as of July 1 of each year, as shown below:

<table>
<thead>
<tr>
<th>Length of Service as of July 1 of the Academic Year</th>
<th>Amount of Annual Scholarship at Any Accredited Institution (Not to Exceed Tuition at School Attended)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>$3,600</td>
</tr>
<tr>
<td>6</td>
<td>$4,320</td>
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<tr>
<td>7</td>
<td>$5,040</td>
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<tr>
<td>8</td>
<td>$5,760</td>
</tr>
<tr>
<td>9</td>
<td>$6,480</td>
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<td>10</td>
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<td>$10,080</td>
</tr>
<tr>
<td>15+</td>
<td>$10,800</td>
</tr>
</tbody>
</table>

Can an Open Tuition Scholarship be used at community colleges or vocational/technical colleges?
This scholarship program is available for use at any accredited institution of higher education in the United States when the dependent child is in a degree-seeking program and enrolled full-time.
Can my dependent child use this benefit for an occasional course?
To be eligible for this benefit, the dependent child must be registered as a full-time, degree-seeking student and the class must be eligible for credit toward that degree.

Can dependents use an Open Tuition Scholarship to pay for Running Start?
Based on the Running Start website, Running Start students and their families do not pay tuition for the college courses, so this benefit may not be used for Running Start.

Is the Open Tuition Scholarship amount listed per academic year per student, or is that a one-time lump sum amount per family?
The scholarship amount listed is per academic year per eligible dependent child.

GENERAL QUESTIONS

How do I apply for education benefits?
Please complete an Application for Education Benefits form prior to the beginning of the quarter/semester in which the benefit will be used. The Application for Education Benefits form contains additional information, instructions and timelines pertaining to each specific scholarship program.

When should I initially apply for education benefits for my dependent child?
To apply for education benefits for dependent children, faculty/staff parents should contact Human Resources in September of the child’s senior year in high school.

Are the TE Exchange, NIC Exchange, NWLA Tuition Scholarship, or Open Tuition Scholarship available just for dependent children or can these scholarships also be used for faculty/staff members, spouses and partners?
These scholarships are available only to dependent children of eligible faculty and staff. A dependent child is defined as one who is claimed as a dependent child on the faculty or staff member’s or the faculty or staff member’s partner’s previous year’s income tax return and who is the faculty or staff member’s natural or adoptive child or the natural or adoptive child of the faculty or staff member’s partner living permanently in the faculty or staff member's home. A divorced faculty or staff member's dependent children, for the purposes of education benefits, are treated as the dependents of both parents. Court-appointed legal wards and foster children are not eligible for education benefits.

Are dependent children only able to use these scholarship programs for undergraduate coursework?
Yes, dependent children are eligible for a combined total of all education benefits, up to the equivalent of four years of undergraduate coursework or a first bachelor’s degree, whichever comes first. Education benefits may not be used for graduate courses for dependent children.
How will the NWLA Tuition Scholarship and Open Tuition Scholarship impact merit- and need-based financial aid offered by other institutions?

Colleges will take into consideration the value of the educational benefit and will offer aid consistent with federal and institution-specific policies. You will need to consult with the financial aid office of the college your dependent child plans to attend to learn about applicable aid policies, which vary from school to school.

If you or your spouse/partner/dependent child plans to attend Puget Sound, please contact Puget Sound’s Student Financial Services office (sfs@pugetsound.edu or 253.879.3214) for helpful information about how tuition remission benefits under this policy might be coordinated with student financial aid.

Are education benefits taxable income?

Undergraduate education benefits for dependent children are not currently taxable income as they meet the IRS definition for "scholarship". IRS tax law is subject to change at any time.

If you have questions about any of these programs, contact Shannon Briggs, Director of Compensation and Benefits, in Human Resources at sbriggs@pugetsound.edu or x3296.