

000330
The Adjutant General
State of Minnesota
1 July 1999

Minnesota National Guard
Circular 621-5-1

EXPIRES 30 JUNE 2000

MINNESOTA STATE INCENTIVES PROGRAM

For the Adjutant General:



THOMAS D. COCHRAN
COL, GS
Mil Pers Mgt. Off

Summary: This circular supersedes previous Minnesota Army National Guard Circular 621-5-1, dated 1 October 1998, with all changes. It provides information and describes procedures for administering the Minnesota State Incentives programs.

Applicability: This circular is applicable to all Minnesota Army & Air National Guard Units/Organizations.

Proponent and Exception Authority: The proponent of this circular is the Military Personnel Management Office (MPMO). The proponent has the authority to approve exceptions to this circular that are consistent with controlling laws and regulations.

Interim Changes. Interim changes to this circular are not official unless they are authenticated by the MPMO. It will become obsolete on the expiration date shown above, unless sooner superseded or rescinded.

Distribution: "A"

100 - RRM

Contents:

Chapter 1. General

Chapter 2. Tuition and Textbook Reimbursement Grant Program

Chapter 3. Leadership Excellence and Dedicated Service (LEADS) Scholarship

Chapter 4. OCS, WOCS, COTS Bonus

Annex A. Minnesota State Tuition and Textbook Reimbursement Grant Program
Memorandum of Understanding and Annual Obligation

Annex B. Minnesota State Tuition and Textbook Reimbursement Grant Program Payment
Request

Annex C. LEADS Scholarship Application Procedure

Annex D. LEADS Interview Information

Annex E. LEADS Selection Committee Information

CHAPTER 1

GENERAL

1-1. The Minnesota Legislature enacted legislation that provides for Tuition Reimbursement for all members and the LEADS Scholarship for enlisted members of the Minnesota National Guard. This circular describes criteria and procedures for administering the Minnesota State Incentives Programs and is effective on 1 July 1999 and will remain in force thru 30 June 2000 unless sooner rescinded or modified.

1-2. PURPOSE. The purposes of the Minnesota State Incentives Program are to **IMPROVE AND MAINTAIN READINESS AND END STRENGTH** of the Minnesota National Guard through the use of Minnesota State Incentives.

1-3. APPLICABILITY. This circular is applicable to all Minnesota Army & Air National Guard units/organizations.

1-4. OBJECTIVE. The objective of this circular is to furnish all units and organizations with guidance and information to effectively conduct the Minnesota State Incentives Programs.

1-5. RESPONSIBILITIES.

- a. Units are responsible for complying with the provisions of this circular.
- b. The Adjutant General is the approving authority for this program.

1-6. FUNDING. The funding available for the Minnesota State Tuition and Textbook Reimbursement Grant Program and LEADS scholarship may be limited by the appropriations from the State Legislature. These programs will continue providing funds are available.

1-7. RECOUPMENT.

- a. Funds paid under State Incentives Programs may be recouped from those individuals who fail to serve satisfactorily in the Minnesota National Guard, as defined by the Adjutant General. (See Minnesota Statute section 192.501, subdivision 2 (a).)
- b. If a member fails to complete a term of enlistment during which a state incentive was paid, a prorated amount of the incentive may be recouped. The **amount of recoupment** will be calculated by the following method:

RECEIVED

JUN 07 2000

LEGISLATIVE REFERENCE LIBRARY
STATE OFFICE BUILDING
ST. PAUL, MN 55155

(1) The total amount paid divided by the number of full years the member enlisted/extended gives the **average payment** per year.

(2) Determine the number of **complete years** the soldier/airman completed of his/her contract.

(3) Take the number of contracted years minus the number of **completed years**; the difference is the number of **years not completed**.

(4) Multiply the number of **years not completed** times the **average payment** per year to determine the **amount of recoupment**.

c. Exceptions to recoupment:

(1) Unit inactivation, relocation or reduction in force.

(2) Interstate transfer to another National Guard unit. (Joining the USAR or the Active Army or Air Force are not exceptions to recoupment.)

(3) Accepting an appointment as an officer or warrant officer in the Minnesota National Guard.

(4) Other exceptions to recoupment will be requested in writing through channels to MNAG-PER-Z and clearly explain the circumstances for the exception. MNAG-PER-Z will review the request and make a determination. MNAG-PER-Z has the authority to begin, continue or discontinue recoupment, or to take other action as appropriate.

CHAPTER 2

MINNESOTA STATE TUITION AND TEXTBOOK REIMBURSEMENT GRANT PROGRAM

2-1. GENERAL:

a. The State of Minnesota sponsors the Minnesota State Tuition and Textbook Reimbursement Grant Program. The funding for the Program is appropriated biennially. If in the future, the legislature does not fund the program, neither the State of Minnesota nor the Minnesota National Guard is obligated to continue such a program.

b. Members of the Minnesota National Guard may use the Minnesota State Tuition and Textbook Reimbursement Grant Program in conjunction with the Montgomery GI Bill or with the Federal Tuition Assistance Program.

c. Tuition and textbook reimbursement grants shall not be considered by the Minnesota Higher Education Coordinating Board or by any other state board, commission, or entity in determining a person's eligibility for a state scholarship or grant-in-aid under Minnesota Statute section 136A.09 through 136A.132.

d. Tuition and textbook reimbursement grants received under Minnesota Statutes 1992, section 192.501, may be used to determine "need" for federally funded scholarships, loans or grants.

2-2. PURPOSE: The purpose of the Minnesota State Tuition and Textbook Reimbursement Grant Program is to:

a. Encourage the recruitment of qualified prior and non-prior service members for the Minnesota National Guard.

b. Encourage members that are currently in the Inactive National Guard or Individual Ready Reserve to reaffiliate with the Minnesota National Guard.

c. Encourage current Minnesota National Guard members to extend their enlistment.

d. Encourage the recruitment of women and minorities into the Minnesota National Guard.

e. Improve the quality of Minnesota National Guard members through higher education.

f. Reward eligible Minnesota National Guard members for their willingness to serve the needs of the State of Minnesota at the order of the Governor.

2-3. ELIGIBILITY CRITERIA: To remain eligible for benefits under this program, members must meet the following criteria:

- a. Maintain Minnesota National Guard membership throughout the entire term for which reimbursement is tendered. If members enlist during a school term, they will be eligible for benefits provided they meet the required criteria.
- b. Successfully complete Basic Training or Basic Military Training prior to receiving program benefits. If they attend college after their enlistment and prior to departure to Basic Training or Basic Military Training, they may receive reimbursement for those courses or terms, upon successful completion of that training.
- c. Must have **NO** periods of Unauthorized Absence (i.e. AWOL) during the period 1 July through 30 June each year.
- d. Must have no more than four periods of Excused Absence during the period 1 July through 30 June each year. A member exceeding the excused absence limitation may request a waiver. Waivers will be reviewed on a case-by-case basis. A member must initiate a letter that must be verified and endorsed through the chain of command, and forwarded directly to the Department of Military Affairs, Veterans Service Building, Education Services Office, St. Paul, MN 55155-2098. The Education Services Office will not approve waivers for Unsatisfactory Performance or AWOL.
- e. Must be attending a post secondary educational institution approved for veteran's benefits.
- f. Must be taking a course of study that is eligible for placement on a transcript from the educational institution. Courses that earn Continuing Education Units (CEUs) are NOT eligible for the Minnesota State Tuition and Textbook Reimbursement Grant Program.
- g. Must not be receiving an ROTC Reserve Component Scholarship.

2-4. TERMINATION:

- a. Members who do not meet the criteria listed above will be terminated from the program as of the term in which they became ineligible and through the remainder of the state fiscal year. Each state fiscal year begins on 1 July and ends on 30 June.
- b. Any member who submits a falsified grade report, transcript or fee statement that does not accurately reflect final course grades, or attempts to receive funds to which he or she is not entitled will be denied payment for the current term, and will be terminated from the program for at least one year.
- c. A member using the Minnesota State Tuition and Textbook Reimbursement Grant Program is no longer eligible to participate once he/she has received funds under this program equivalent to 208 quarter/144 semester credits.

2-5. TUITION REIMBURSEMENT GUIDELINES FOR UNDERGRADUATE COURSEWORK:

a. The Minnesota State Tuition and Textbook Reimbursement Grant Program reimburses a portion of a member's educational costs. The amount of reimbursement will be determined by the Adjutant General, pursuant to the following criteria.

b. For undergraduate coursework reimbursement is authorized as follows:

(1) Members are reimbursed only for those courses for which they receive a grade of "C", Pass, Satisfactory, or higher.

(2) Members ARE NOT reimbursed for those courses for which they "withdraw" or receive a grade of "C-" or lower.

(3) Members are reimbursed for those courses for which they receive an "Incomplete", if a grade of at least "C" or higher is later earned. A copy of the original ESO Form 621-5-2, current grade report or transcript and a short statement requesting reimbursement for the "Incomplete" should be forwarded to the Education Services Office. The request to pay the "Incomplete" can be included with the current term's reimbursement request.

c. For coursework beginning Fall 1999 and later, reimbursement is made at the following rates:

(1) At any Minnesota public educational institution, reimbursement is at the following rates:

(a) University of Minnesota, upper and lower division, all campuses, is at **\$54.00** per quarter credit or **\$81.00** per semester credit, up to the lowest number of credits in the plateau used by the member. Additional credits above the plateau, if any, are reimbursed on a per-credit basis. Also, U of M students only are reimbursed an additional \$30.00 per term.

(b) Minnesota State Universities (Bemidji, Mankato, Metropolitan, Moorhead, St Cloud, Southwest, Winona, and Akita Campus in Japan) are at **\$37.00** per quarter credit or **55.00** per semester credit. For those Minnesota State Universities which use a credit band, the reimbursement amount to students paying the resident, undergraduate, full-time rate will be figured using this equation: The amount of tuition charged for a full time, resident student divided by the per-credit amount the school charged up to the credit band equals the break-even point. The full-time, resident student may then be reimbursed at the above-mentioned per-credit amount, up to the number used to determine the break-even point in the credit band, rather than the lowest number in the band.

(c) Minnesota State Community Colleges and Minnesota State Technical Colleges are at **\$31.00** per quarter credit or **\$46.00** per semester credit.

(d) Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of 50% of tuition only, without additional fees, rather than the clock hour rate of **\$1.45**.

(2) At any private institution, reimbursement is at the same per-credit rate as at the University of Minnesota, for credits completed by the above guidelines. This rate is **\$54.00** per quarter credit or **\$81.00** per semester credit. Also, each member will only be reimbursed for up to 18 credits per school term. Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of **\$1.45** per clock hour.

(3) At any out-of-state public institution, reimbursement is at the same rate as Minnesota public institutes or colleges. The rates follow:

(a) For a four-year research university comparable to the U of M, Twin Cities, the rate will be at **\$54.00** per quarter credit or **\$81.00** per semester credit, i.e. University of Wisconsin, Madison.

(b) For state universities, the rate will be at **\$37.00** per quarter credit or **\$55.00** per semester credit.

(c) For community colleges and technical institutions, the rate will be at **\$31.00** per quarter credit or **\$46.00** per semester credit.

(d) Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of **\$1.45** per clock hour.

(4) For educational institutions that use a "credit plateau", the lowest number of credits in that plateau will be used to determine reimbursement, for credits completed by the above guidelines. For example, the University of North Dakota has a "twelve credits and above" credit plateau. Students pay a per credit rate for tuition up to twelve credits; they may register for more, but are still only charged for twelve. If a student completes 18 credits in a term using the above guidelines, then that student will only be reimbursed for 12 credits, not 18, because of the credit plateau.

(5) The reimbursement for members attending schools which charge a "flat" tuition rate for an unlimited number of credits will either be for eighteen credits or the actual number of credits completed by the above guidelines, whichever is less, per term.

(6) For those soldiers who receive tuition waivers, where they in effect do not pay any tuition or their fee statement indicates that no tuition was charged, no reimbursement will be authorized.

(7) High school students who attempt post-secondary training, where the training is paid by the high school, school district, or state, are not eligible to receive reimbursement for this training under this program.

2-6. GUIDELINES FOR GRADUATE COURSEWORK:

a. Effective 1 January 1996, post-baccalaureate and graduate level coursework, i.e., Master's, Ph.D, Professional degrees, is covered under the Minnesota State Tuition and Textbook Reimbursement Grant Program, for eligible soldiers.

b. Those enrolled in post-baccalaureate coursework are subject to the same rules for members taking undergraduate coursework and will be reimbursed at the same rate, as stated previously in this regulation, with the exception that only grades of "B" or better (or equivalent) must be obtained.

c. Only Minnesota Guardmembers, from the ranks of E-1 through O-3 (to include Warrant Officers) are eligible to receive reimbursement for post-baccalaureate and graduate level coursework. Field grade officers (O-4 and above) are not eligible to use the Minnesota State Tuition and Textbook Reimbursement Grant Program for this coursework.

d. A soldier who is promoted to rank of O4 during the school term will continue to be eligible to use the Minnesota State Tuition and Textbook Reimbursement Grant Program for post-baccalaureate coursework until the end of that term.

2-7. APPLICATION PROCEDURES:

a. Carefully READ, SIGN and submit the "Memorandum of Understanding", comprised of ESO Form 621-5-1, pages one through four. This memorandum specifically outlines the member's responsibility for obtaining reimbursement under the Minnesota State Tuition and Textbook Reimbursement Grant Program. (Attached as Annex A.)

b. Annually complete ESO Form 621-5-1, page five, the "Annual Obligation Request." The "Annual Obligation Request" will set aside funds for the school year. The annual obligation is an estimation of tuition costs, credits and terms and reflects education plans for the current school year, including summer sessions. If there are changes from the annual obligation, reflect these changes on ESO Form 621-5-2, "Payment Request", when submitted.

c. Complete one copy of the "Memorandum of Understanding" (ESO Form 621-5-1, pages one through four) the first time a member uses the program. The "Memorandum of Understanding" may be forwarded to the Education Services Office any time, up until the first request for reimbursement, but needs to be submitted with an Annual Obligation. The "Memorandum of Understanding" will remain on file at the Education Services Office. The obligation will remain in effect for the duration of the member's program use. It is a responsibility of the soldier/airman to follow any rule changes.

d. The Education Services Office will set aside funds according to the "Annual Obligation Request". The annual obligation is only an estimate of the amount of tuition to be reimbursed. The actual amount of reimbursement is dependent on the school, credits and terms attended.

e. The Education Services Office will return a Letter of Instruction to the member's unit of assignment that acknowledges receipt of the "Annual Obligation Request" and outlines any further instructions as necessary.

2-8. REQUEST FOR REIMBURSEMENT PAYMENT: To receive reimbursement, the member must:

a. Complete and sign ESO Form 621-5-2, "Payment Request." By signing this application the soldier is verifying that all information is true and correct. It also authorizes the ESO to contact the school to verify course grades. The member, with assistance from the Unit Administrator, is responsible to insure that ESO Form 621-5-2, along with a statement of tuition charged and an ORIGINAL grade report or transcript is forwarded to the Education Services Office within sixty days after the "official" last day of the term. (Attached as Annex A.)

b. The Education Services Office will retain reimbursement requests forwarded in excess of sixty days, and will process them for payment in August of the next state fiscal year, provided funds are available. If no payment request has been received in the Education Services Office 120 days or more after a term has ended, the funds for that term will be deobligated. Applications for reimbursement forwarded to the Education Services Office after funds have been deobligated will be returned with exceptions being handled on a case-by-case basis.

c. Requests for reimbursement received with photocopied or facsimile grade reports or transcripts will be returned for correction. The Education Services Office will not return original grades or transcripts to units or individuals.

d. The Education Services Office will review the submitted ESO Form 621-5-2 and attached documents for completeness, validity and determination of the actual reimbursement due.

2-9. TUITION REIMBURSEMENT - SURVIVOR BENEFIT:

a. Effective 1 January 1993, if a member of the Minnesota National Guard is killed while performing military duty, his or her surviving spouse and/or surviving dependents under age 24 (to include biological children of the deceased born within 10 months after the member's death), become eligible for a State of Minnesota funded post-secondary tuition reimbursement benefit.

b. This benefit covers deaths that occur during actions taken in the course and scope of the Guardmember's assigned duties, while on state active service or federally funded state active service as defined in Minnesota Statutes section 190.05. The benefit also covers deaths during direct travel to or from the assigned duty. Deaths from natural causes or suicide are not included.

c. Surviving spouses remain eligible for the benefit until attainment of a baccalaureate degree or remarriage.

d. Surviving dependents remain eligible for the benefit until attainment of a baccalaureate degree or until they reach the age of 24.

e. The Office of the Adjutant General will issue a Letter of Eligibility that outlines the tuition reimbursement benefit. The letter will be forwarded to the surviving spouse; if no spouse, the oldest adult dependent; or the guardian of minor children. The letter will indicate by name, date of birth and social security account number, those dependents eligible for tuition reimbursement.

f. The Minnesota Army National Guard Military Personnel Management Office will manage this benefit program and maintain files on all Letters of Eligibility issued.

2-10. TUITION REIMBURSEMENT SURVIVORS BENEFIT GUIDELINES:

a. The Minnesota State Tuition Reimbursement Program reimburses tuition costs only. Activity fees, computer user fees, registration fees, segregated fees, books, room and board expenses, and other school-related fees are not reimbursable under this program.

b. Reimbursement is authorized as follows:

(1) Students are reimbursed only for those courses in which they receive a grade of "C", Pass, Satisfactory, or higher.

(2) Students are not reimbursed for those courses from which they withdraw or receive a grade of "C-" or lower.

(3) Students are reimbursed for those courses in which they receive an "Incomplete", if a grade of at least "C" or higher is later earned. Reimbursement for the "Incomplete" must be requested within 60 days of its completion. A copy of the original ESO Form 621-5-2S, current grade report or transcript and a short statement requesting reimbursement for the "Incomplete" should be forwarded to the Education Services Office. The request to pay the "Incomplete" can be included with the current term's reimbursement request.

c. Reimbursement is made at the following rates:

(1) At any Minnesota public educational institution approved for Veterans Affairs benefits, reimbursement is 100% of the tuition charged to the student.

(2) At any Minnesota private or out-of-state educational institution approved for Veterans Affairs benefits, reimbursement will not exceed 100% of the resident tuition costs charged at the University of Minnesota, Lower Division, Twin Cities campus.

(3) At any Minnesota private or out-of-state technical or vocational educational institution approved for Veterans Affairs benefits, reimbursement will not exceed 100% of the tuition costs charged per credit or clock hour at Minnesota public technical institutes or colleges.

(4) The reimbursement rate to students paying non-resident tuition rates that are higher than the resident rates at a Minnesota public post-secondary educational institution will not exceed 100% of the resident tuition costs at that institution. The reimbursement rate to members paying a reciprocal rate that is lower than the resident rate at that institution, will not exceed 100% of what was charged.

(5) To determine the per credit tuition cost at an educational institution that uses a "credit plateau", divide the total tuition cost by the lowest number of credits within the plateau. For example, the University of North Dakota has a "twelve credit and above" credit plateau, in which, tuition for students taking twelve or more credits is the same. The per credit cost is determined by dividing the amount of tuition by twelve. If the per credit cost for an institution exceeds the cost of the University of Minnesota, Lower Division, Twin Cities campus, the reimbursement is based on a maximum quarter and semester credit rate established annually.

(6) The reimbursement for students attending schools which charge a "flat" tuition rate for an unlimited number of credits is reimbursed for a maximum of eighteen credits per term.

2-11. TUITION REIMBURSEMENT - SURVIVOR BENEFIT APPLICATION AND PAYMENT PROCEDURES:

a. Students eligible for this benefit will complete an ESO Form 621-5-1S, "Annual Obligation Request - Survivor Benefit", at the beginning of each school year, to obligate reimbursement funds for that entire school year. The "Annual Obligation Request" estimates tuition costs, credits and terms to be attended for the school year, to include summer sessions. Changes from the estimated plan will be reflected when the student submits the actual request for reimbursement. Forward the form to the Education Services Office at the Office of the Adjutant General. A copy of the Letter of Eligibility must accompany the obligation request.

b. To receive reimbursement the student must complete an ESO Form 621-5-2S, "Payment Request - Survivor Benefit". That form, along with the statement of tuition charged and an ORIGINAL grade report or transcript must be forwarded to the Education Services Office at the Office of the Adjutant General within sixty days of the official last day of the term.

c. Requests for reimbursement forwarded in excess of the 60 days will be retained and processed for payment in August of the next state fiscal year.

d. Upon approval, reimbursement checks will be sent directly to the address provided by the student.

2-12. TUITION REIMBURSEMENT SURVIVORS BENEFIT TERMINATION: Any student who submits a falsified grade report, transcript or fee statement that does not accurately reflect final course grades, or attempts to receive funds to which he or she is not due, will be terminated from this program for a minimum of one year.

2-13. MEDICAL TUITION REIMBURSEMENT:

a. **PURPOSE:** To encourage physicians to accept a Medical Corps commission in the Minnesota Army National Guard upon completion of medical school.

b. **REIMBURSEMENT:** This program pays tuition reimbursement for medical students, not to exceed 50% of the tuition costs at the University of Minnesota, Medical School, Twin Cities campus. Reimbursement will not be paid without an original transcript/grade slip.

c. **ELIGIBILITY:** Only soldiers appointed as medical students (AOC 00E67) are eligible for this program. No more than ten participants are allowed in this program at one time.

d. **APPLICATION PROCEDURE:**

1) Sign a Statement of Understanding for Medical Students, which can be obtained from the Education Services section.

2) Annually submit the Annual Obligation form (Annex A, page 5) to the Education Services section. Within sixty days from term/course completion, complete the Payment Request form (Annex B) and submit with original transcript/grade.

3) The AMEDD Officer will assist the Education Services section in monitoring the Medical School Tuition Reimbursement program. The AMEDD Officer is responsible to monitor the number of students in the program and their eligibility for benefits.

4) The criteria and deadlines for application and reimbursement remain the same for this program as with the Minnesota State Tuition Reimbursement program as indicated in this publication.

d. **OBLIGATION AND RECOUPMENT:**

1) A contractual service obligation is incurred for participation in this program. The obligation, to be served after graduation from medical school, will be for the same amount of time that the student participated in the program. The officer must remain an active member in the National Guard for their entire contracted service obligation. Termination of medical school enrollment will result in a continued service obligation as a Medical Service Corps Officer.

2) The contractual service obligation is computed by taking the date of separation from 00E67 status, minus the date of appointment as 00E67, plus one day.

3) Officers who do not fulfill their contracted service obligation will have a prorated amount recouped.

4) Participation in this program does not prohibit participation in the Specialized Training Assistance program (STRAP) or Health Professional Loan Repayment program (HPLRP).

CHAPTER 3

Leadership Excellence and Dedicated Service (LEADS) Scholarship

3-1. A \$1,000.00 LEADS Scholarship will be paid to selected high school seniors who complete the application process and become a Minnesota National Guard member. Guard members may receive this scholarship in addition to the Minnesota State Tuition and Textbook Reimbursement Grant Program.

3-2. Eligibility for the \$1,000.00 LEADS Scholarship payment.

- a. High school senior.
- b. Membership with the Minnesota National Guard.
- c. Be selected by the LEADS Scholarship selection committee
- d. Complete basic training.

3-3. APPLICATION PROCESS:

a. All students must complete the following: (See Annex C)

1. Data sheet to include school certified GPA and class rank.
2. Letter of recommendation from school teacher.
3. Essay.

b. Application packets must be completed and sent to the Education Services Office no later than **1 March each year**. Award recipients will be notified by 1 May of each year. Students must become members of the Minnesota National Guard in order to receive their monetary award.

c. Commander or designated representative will conduct a personal interview with qualified applicants not already in the National Guard, preferably at applicant's school. See Annex D for the LEADS interview format and sample interview questions.

d. For applicants already in the National Guard, the Commanders will write a letter of recommendation addressing the same criteria as the interview (Annex D-1, 3a-f) and assessing a point value from zero to 50 (Annex D-2).

e. Scholarship Committee will review and rank order all application packets based on criteria in Annex E.

f. Selected Scholarship recipients that are not members of the National Guard will receive a preliminary acceptance letter from the Education Services Officer and must enlist into the Minnesota National Guard to receive payment.

g. Selected scholarship recipients that are members of the Minnesota National Guard or those that enlist will receive a final award letter from the Education Services Officer.

3-4. POST AWARD PROCEDURES:

1. Student receives final award letter.
2. Student completes basic training.
3. Student furnishes copy of fee statement to the Education Services Officer.
4. Joint payment made to student/academic institution.

3-5. RESPONSIBILITIES:

a. Education Services Officer:

1. Select the Scholarship Committee which will include a civilian, NCO, company grade officer and a recorder.
2. Issue preliminary award letters to award recipients that are non National Guard members.
3. Issue final award letter to award recipients who enlist in or who are currently in the MN ARNG.
4. Maintain applicant database.
5. Process payments for award recipients.

b. Scholarship Committee Members:

1. Review all applications
2. Rank order applications and provide to the Education Services Officer.

c. Unit Commander:

1. Recommendation letter for applicants in unit.
2. Interview applicants who may be future unit members.
3. Promote scholarship in unit schools and local media.
4. Plan/Attend award banquets to present awards.

d. Recruiting NCOIC's:

1. Promote scholarship in unit schools and local media.
2. Attend award banquets to present awards.

CHAPTER 4

4-1 General. The adjutant General has authorized a \$1,000.00 bonus upon commissioning for soldiers/airmen who began their commissioning courses after 1 Jul 99. The officer and warrant officer strength has been decreasing over the last few years. The purpose of this bonus is to attract more soldiers/airmen to attend a commissioning course and become officers.

4-2 Eligibility for the bonus.

- a. Commissioned from Federal OCS, State OCS, WCOS, or Air Guard COTS (Commissioned Officer Training School)
- b. Can not be a full-time Guard member (AGR or Technician)

4-3 Payment procedures.

- a. For Army National Guard. Upon federal recognition of the officer appointment, the officer section will supply the incentive section with the name, SSN, and address so the officer can be processed for payment. A check will then be sent to the officer's home address.
- b. For Air National Guard. The Base Education Training Manager at each of the air bases will e-mail the name SSN, and address of those who complete the COTS to the Education Services Office so the officer can be processed for payment. A check will then be sent to the officer's home address.

4-4 Taxes. Taxes are not withheld from the payment. The bonus recipient is responsible to report this payment as income when they fill out their taxes each year.

4-5 Recoupment. Since the payment for this bonus is made upon commissioning, there is no recoupment required.

MINNESOTA STATE TUITION AND TEXTBOOK REIMBURSEMENT GRANT PROGRAM

MEMORANDUM OF UNDERSTANDING

I, the undersigned, acknowledge that I have read this memorandum prior to signing it and fully understand the policies and procedures of the Minnesota State Tuition Reimbursement Program as described herein.

1. INTRODUCTION.

a. The Minnesota State Tuition Reimbursement Program is sponsored by the State of Minnesota. The funding for this program is appropriated biennially. If in the future, the Tuition Reimbursement Program is not funded by the state, I understand that neither the State of Minnesota nor the Minnesota National Guard is obligated to continue the benefit.

b. To receive reimbursement under the auspices of this program, I must meet the criteria indicated below.

2. CRITERIA.

a. I am/was a member of the Minnesota National Guard throughout the entire term for which I am requesting reimbursement. If I enlist during a term, I am eligible for benefits provided I meet the required criteria.

b. I successfully complete Basic Training or Basic Military Training prior to receiving program benefits. If I attend college after my enlistment and prior to Basic Training or Basic Military Training, I may receive tuition reimbursement for those courses or terms, upon successful completion of that training.

c. I have **NO** periods of unauthorized absence (i.e. AWOL) during the period of 1 July through 30 June each year while participating in the program.

d. I have no more than four periods of Excused Absence during the period of 1 July through 30 June each year. I may request a waiver for exceeding the excused absence limitation. Waivers will be reviewed on a case-by-case basis. I must initiate a letter to be verified and endorsed through the chain of command and forwarded to the Department of Military Affairs, Veterans Service Building, Education Services Office, St Paul, MN 55155-2098. The Education Services office will not approve waivers for Unauthorized Absence or Unsatisfactory Performance.

e. I am attending a post secondary educational institution approved for veterans' benefits.

f. I am taking course(s) of study that are eligible for placement on a transcript from the educational institution. Courses that earn Continuing Education Units (CEUs) are **NOT** eligible for the Minnesota State Tuition Reimbursement Program.

g. I am not receiving a ROTC Reserve Component Scholarship.

h. I meet the criteria above or I will be terminated from the program as of the term in which I do not meet the criteria and through the remainder of the state fiscal year. Each fiscal year begins on 1 July and ends on 30 June.

i. I may no longer participate in this program once I have received funds equivalent to 208 quarter/144 semester credits, beginning with coursework starting 1 July 1996 and later.

3. TUITION REIMBURSEMENT GUIDELINES:

a. If I meet the above criteria, I will be reimbursed a portion of my educational costs. The amount of reimbursement will be determined by the Adjutant General, based on the following criteria:

(1) For Undergraduate Work:

(a) I will be reimbursed only for those courses for which I receive a grade of "C", pass, satisfactory, or higher.

(b) I will NOT be reimbursed for those courses for which I "withdraw" or receive a grade of "C-" or lower.

(c) I will be reimbursed for those courses for which I receive an "Incomplete", if later I earn a grade of at least "C" or higher. I understand that I must request reimbursement for the "Incomplete" within 60 days of its completion. I will forward a copy of the original ESO Form 621-5-2, current grade report or transcript and a short statement requesting reimbursement for the "Incomplete" to the Education Services Office. This information can be included with my current reimbursement request.

(2) For Graduate Level and Post-Baccalaureate work:

(a) I will be reimbursed only for coursework for which I receive a grade of "B" (or comparable) or higher.

(b) I will NOT be reimbursed for coursework for which I "withdraw" or receive a grade of "B-" (or comparable) or lower.

(c) I will be reimbursed for those courses for which I receive an "Incomplete", if later I earn a grade of at least "B" (or comparable) or higher. I understand that I must request reimbursement for the "Incomplete" within 60 days of its completion. I will forward a copy of the original ESO Form 621-5-2, current grade report or transcript and a short statement requesting reimbursement for the "Incomplete" to the Education Services Office. This information can be included with my current reimbursement request.

(d) Only E1-03 (to include WOs) are eligible for post-baccalaureate and graduate level work. If I am promoted to Major during a term, my reimbursement ends with the term.

b. Reimbursement is made at the following rates (rates may change annually as tuition costs rise):

(1) At any Minnesota public educational institution, reimbursement is at the following rates:

(a) University of Minnesota, upper and lower division, undergraduate and graduate, all campuses, is **\$54.00** per quarter credit or **\$81.00** per semester credit, up to the lowest number of credits in the plateau used by the member. Additional credits above the plateau, if any, are reimbursed on a per credit basis. In addition, University of Minnesota Students Only, are reimbursed an additional **\$30.00 per term**.

(b) Minnesota State Universities (Bemidji, Mankato, Metropolitan, Moorhead, St. Cloud, Southwest, Winona and Akita Campus of Japan), undergraduate and graduate, are at **\$37.00** per quarter credit or **\$55.00** per semester credit. For those Minnesota State Universities which use a credit band, the reimbursement amount to students paying the resident, undergraduate, full-time rate will be figured using this equation: The amount of tuition charged for a full-time, resident student divided by the per-credit rate charged up to the credit band equals the break-even point. The full-time, resident student may then be reimbursed at the above-mentioned per credit rate, up to the number used to determine the break-even point in the credit band, rather than the lowest number of credits in the band.

(c) Minnesota Community Colleges and Minnesota Technical Colleges are at **\$31.00** per quarter credit or **\$46.00** per semester credit.

(d) Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of 50% of tuition only, without additional fees, rather than the clock hour rate of **\$1.45**.

(2) At any private institution, reimbursement is at the same per-credit rate as the University of Minnesota, for credits completed by the above guidelines. This rate is **\$54.00** per quarter credit or **\$81.00** per semester credit. Also, any member will not be reimbursed for more than 18 credits for any school term. Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of **\$1.45** per clock hour.

(3) At any out-of-state public institution, reimbursement is at the same rate as Minnesota public technical institutes or colleges. The rates follow:

(a) For four-year research universities, comparable to the U of M, Twin Cities, the rate will be at **\$54.00** per quarter credit or **\$81.00** per semester credit.

(b) For state universities, the rate will be at **\$37.00** per quarter credit or **\$55.00** per semester credit.

(c) For community and technical colleges, the rate will be at **\$31.00** per quarter credit or **\$46.00** per semester credit.

(d) Reimbursement for coursework which otherwise meets the set guidelines for reimbursement, but is completed in clock hours, will be reimbursed at the rate of **\$1.45** per clock hour.

(4) For educational institutions that use a "credit plateau", the lowest number of credits in that plateau are used to determine reimbursement, for credits completed by the above guidelines. For example, the University of North Dakota has a "twelve credits and above" credit plateau. Students pay a per-credit rate for tuition up to twelve credits; they may register for more, but are still only charged for twelve. If a student completes 18 credits in a term using the above guidelines, then that student is only reimbursed for 12 credits, not 18, because of the credit plateau.

(5) The reimbursement for members attending schools which charge a "flat" tuition rate for an unlimited number of credits will either be for eighteen credits or the actual number of credits completed by the above guidelines, whichever is less, per term.

(6) For those soldiers who receive tuition waivers, where they in effect do not pay any tuition or their fee statement indicates that no tuition was charged, no reimbursement will be authorized.

(7) High school students who attempt post-secondary training, where the training is paid by the high school, school district or state, are not eligible to receive reimbursement for this training under this program.

4. APPLICATION PROCEDURES. I will follow the steps below to apply for the Minnesota State Tuition Reimbursement Program:

a. Carefully read, sign and submit the "Memorandum of Understanding", which is comprised of ESO Form 621-5-1, pages one through four. By signing this application the soldier is verifying that all information is true and correct. It also authorizes the ESO to contact the school to verify course grades. Forward the completed form along with an Annual Obligation form to the Education Services Office any time, up until the first request for reimbursement. This "Memorandum of Understanding" will remain in effect for the duration of my use of this program. I will keep current with, and abide by, any future changes to the program.

b. Complete the "Annual Obligation Request", ESO Form 621-5-1, page five and submit it along with the "Memorandum of Understanding". The "Annual Obligation Request" will set aside funds for the school year. This request represents an estimation of tuition costs, credits and terms for the current school year (1 July through 30 June). The request reflects my educational plans for the current school year, including summer sessions. Reflect any changes from the annual obligation on ESO Form 621-5-2, "Payment Request", when submitted. An "Annual Obligation Request" must be submitted at the beginning of each new school year.

c. The Education Services Office will set aside funds according to the "Annual Obligation Request" and actual tuition costs at the various colleges and universities. The annual obligation is only an estimate of the amount of tuition to be reimbursed. The actual amount of reimbursement is dependent on the school, credits and terms attended.

d. The Education Services Office will return a Letter of Instruction to my unit of assignment. This letter acknowledges that the ESO Form 621-5-1 was received, and that funds are reserved. This LOI should be retained by myself or the unit for future reference. The original ESO Form 621-5-1 is retained at the Education Service Office.

5. REIMBURSEMENT PROCEDURES. To receive reimbursement, I must complete ESO Form 621-5-2, "Payment Request".

a. These forms are available at my unit. I am responsible to insure that ESO Form 621-5-2, along with a statement of tuition charged and an ORIGINAL grade report or transcript is forwarded to the Education Services Office within sixty days after the "official" last day of the term.

b. Requests for reimbursement received with photocopied grade reports or transcripts or copies sent via facsimile machine will be returned for correction.

c. The Education Services Office will not return my original grade reports or transcripts. If I need an original for another reason, then I will need to make other arrangements for one. NOTE: I do not need to furnish the Education Services Office with an "official " transcript, only an original.

d. The Education Services Office will retain reimbursement requests forwarded in excess of sixty days, and will process them for payment in August of the next state fiscal year, provided funds are available. If no payment request has been received in the Education Services Office 120 days or more after a term has ended, the funds will be deobligated. Applications for reimbursement received after funds have been deobligated will be returned without payment. Exceptions will be handled on a case-by-case basis.

e. The Education Services Office will review the submitted ESO Form 621-5-2 and attached documents for completeness, validity and determination of the actual reimbursement due.

6. I understand that it is my responsibility to insure that my application for the Minnesota State Tuition Reimbursement Program are submitted within the guidelines indicated herein. Late requests for reimbursement will delay my reimbursement until after the end of the state fiscal year and will be processed only if sufficient funds exist.

7. I further understand that any attempt to submit falsified documents will result in my termination from the Minnesota State Tuition and Textbook Reimbursement Grant Program for a MINIMUM of one year.

8. The regulation for the Minnesota State Tuition Reimbursement Program is MN ARMY & AIR Circular 621-5-1.

9. I FULLY UNDERSTAND THE DIRECTIVES OUTLINED HEREIN AND MY RESPONSIBILITIES FOR THE MINNESOTA STATE TUITION REIMBURSEMENT PROGRAM.

SIGNATURE OF INDIVIDUAL	TYPED NAME	SSN	DATE
-------------------------	------------	-----	------

SIGNATURE OF UNIT REPRESENTATIVE	TYPED NAME	DATE
----------------------------------	------------	------

MINNESOTA ARMY AND AIR NATIONAL GUARD
REQUEST FOR STATE TUITION AND TEXTBOOK REIMBURSEMENT GRANT PROGRAM
ANNUAL OBLIGATION REQUEST

"I have read and signed MN-NG Form 621-5-1, pages one through four, "Memorandum of Understanding" understand that I am responsible for all of the latest, annual information contained therein."

INITIALS

NAME (LAST, FIRST, M.I.)

SSN

RANK

UNIT OF ASSIGNMENT / LOCATION:

NAME OF SCHOOL:

STUDENT STATUS: ☐ VOC/TECH ☐ FRESH ☐ SOPH ☐ JR ☐ SR ☐ GRAD

SCHOOL YEAR: _____ Completed Basic Training / Basic Military Training ☐ YES ☐ NO

ANTICIPATED TERMS ATTENDING:

QUARTERS	ESTIMATED START DATE	ESTIMATED END DATE	EST # OF CREDITS	EST COST OF TUITION	Funds Obligated ESO Use Only
FALL QTR					
WINTER QTR					
SPRING QTR					
SUMMER 1					
SUMMER 2					

SEMESTERS	ESTIMATED START DATE	ESTIMATED END DATE	EST # OF CREDITS	EST COST OF TUITION	Funds Obligated ESO Use Only
FALL SEM					
JANUARY INTERIM					
SPRING SEM					
SUMMER 1					
SUMMER 2					

"I understand that this Annual Obligation Request is only an estimate and that the actual amount of tuition reimbursement will be based on the number of credits I complete with at least a "C" grade or better for undergraduate and "B" or better for post-baccalaureate/graduate-level coursework, and in accordance with Cir 621-5-1 (1 July 1999)."

"I further understand that it is my responsibility to ensure that my requests for reimbursement are forwarded to the Education Services Office within 60 days of the last day of the term, or I will not receive my reimbursement until August of the next State Fiscal Year, or not at all if past 120 days of a term's end."

"I authorize the Education Services Office to verify my grades through my educational institution."

SIGNATURE

DATE

FUNDS OBLIGATED FOR TERMS INDICATED: _____ (ESO USE ONLY)

MN-NG Form 621-5-1-R-E (1 July 1999, Previous Editions Obsolete)

Annex A-5

MN-NG Cir 621-5-1 (1Jul 99)

MINNESOTA ARMY AND AIR NATIONAL GUARD
REQUEST FOR STATE TUITION REIMBURSEMENT PROGRAM
PAYMENT REQUEST

INSTRUCTIONS: Complete this form, and attach original grades and a fee statement for term indicated below. Submit to your unit clerk or unit administrator. This application for reimbursement must be in the Education Services Office within 60 days of the end of the term. If you have an Incomplete which will not be changed to a permanent grade by the end of the 60 days, do not wait for it.

NAME (LAST, FIRST, M.I.) _____ SSN _____ RANK _____

ADDRESS: _____

STREET _____ CITY _____ STATE _____ ZIP _____

UNIT OF ASSIGNMENT / LOCATION _____

NAME OF SCHOOL: _____

STUDENT STATUS: ☐ VOC/TECH ☐ FRESH ☐ SOPH ☐ JR ☐ SR ☐ GRAD

TERM: ☐ FALL QTR ☐ WTR QTR ☐ SPR QTR ☐ SS1 ☐ SS2
☐ FALL SEM ☐ J TERM ☐ SPR SEM ☐ SS1 ☐ SS2
☐ CORRESPONDENCE/INDEPENDENT STUDY COURSE

FILL IN NUMBER OF CREDITS _____ QUARTER _____ SEMESTER _____ HOUR _____
 COMPLETED FOR TYPE OF TERM: _____ CORRESPONDENCE/INDEPENDENT STUDY _____

PER CREDIT COST _____ TOTAL TUITION CHARGED \$ _____

ARE YOU RECEIVING A ROTC SCHOLARSHIP OR DID YOU RECEIVE A STATE ENLISTMENT BONUS?

Select one: ☐ YES ☐ NO

(ESO USE ONLY) TOTAL COST TO STATE: \$ _____

I verify that of this day the address indicated above is correct. The reimbursement check should be mailed to this address. Any change of address will result in delayed payments. The information and documentation I have submitted, herewith, is true and correct. I authorize the Education Services Office to verify my grades through my educational institution.

SIGNATURE OF APPLICANT _____ DATE _____

ESO USE ONLY:

Payment Suspended: _____

Payment Processed: _____

Payment Authorized: _____

APPLICANT'S PHONE NUMBER _____

I certify that all required documents are attached, that the above indicated person was a satisfactory participant during the term indicated, and has completed Basic Training / Basic Military Training.

Signature of Commander / Unit Administrator

Unit Phone Number

LEADS SCHOLARSHIP APPLICATION PROCEDURE

1. On a blank sheet of paper please type the following information:

- a. Full name
- b. Address
- c. Telephone number and best time you can be reached
- d. Current cumulative grade point average on a 4.0 scale
- e. Current class rank

Attach a copy of your transcript with a school counselor verification to this application.

2. On separate sheets, typed, double spaced, with your name at the top of each page, in two pages or less please answer the following essay questions:

a. Describe your long and short term goals and how you see the National Guard helping you meet them.

b. Describe your leadership and community service experiences and how your leadership has influenced your school and community.

3. Attach a letter of recommendation from a school teacher, coach, or administrator, commenting on your maturity, leadership potential, and service to the school and community.

4. Submit completed applications to: LEADS

ATTN: MNAG-PER-ES
Veterans Service Building
20 West 12th Street
St. Paul, MN 55155-2098

LEADS INTERVIEW INFORMATION

1. The information in this annex will be provided to all interview panel members. The purpose of the personal interview is to further assess the potential of the applicant to become a future leader in the Minnesota Army National Guard. The interview will be conducted at the applicants school, home, or a convenient location, by a Minnesota Army National Guard Officer, preferably a unit commander.

2. All military members will wear the Class A uniform while conducting interviews.

3 Upon completion of the interview the interviewer will rate the applicant on a scale of 1-10 with one being the lowest and 10 the being highest on the following criteria:

a. Appearance. Does the applicant appear fit for military service and look the part of a future leader?

b. Communication ability. Did the applicant clearly and directly answer the questions and communicate his or her thoughts?

c. Maturity. Does the applicant appear ready to assume leadership roles?

d. Leadership potential. In your opinion does this person have what it takes to become a good NCO or Officer in the future?

e. Overall assessment. Would you want this person to be in your Unit? Would he/she be an asset to the National Guard?

f. Add any additional comments that are important.

4. Ensure that the applicant realizes that they must complete the ASVAB, pass a physical, and enlist to receive the monetary portion of this scholarship.

5. The interview is intended to last 15 to 20 minutes. A list of suggested questions and a score sheet are on the following page.

It is strongly suggested that applicants be asked the following questions:

- a. Tell me a little bit about yourself.
- b. Why did you apply for the LEADS Scholarship?
- c. What are your long term goals? How do you see the National Guard helping you to meet them?
- d. Tell me about someone you respect and how that person earned your respect.
- e. What are three qualities you feel a good leader must possess and why?
- f. Are you aware of the Education benefits available to members of the Minnesota Army National Guard in addition to this scholarship?
- g. Do you have any questions about the scholarship application procedure or the National Guard?
- h. With the other benefits in mind, would you be interested in becoming a member of the Minnesota Army National Guard even if you are not selected for this scholarship?
- i. Describe a failure and how you dealt with it.
- j. Tell me about your most significant achievement and why you deem it as such.
- k. What leadership activity are you involved in at school?
- l. What are your views on the US involvement in Bosnia? Korea? Haiti?
- m. How do you think the Military can avoid problems such as the Tailhook scandal and the situation at Aberdeen Proving Grounds?

- | | |
|--------------------------------|------------|
| 1. Appearance: 1-10 | Score_____ |
| 2. Communication ability: 1-10 | Score_____ |
| 3. Maturity: 1-10 | Score_____ |
| 4. Leadership Potential: 1-10 | Score_____ |
| 5. Overall assessment: 1-10 | Score_____ |

Total Score_____/50

Comments:

LEADS SELECTION COMMITTEE INFORMATION

1. The purpose of this committee is to select applicants who will most likely become future leaders in the Minnesota Army National Guard. To aid in this selection there has been a point system established (see below). This system is a tool to aid in the decision process, it is not an objective evaluation form.

SCORE SHEET FOR _____.

Interview	____/50
Essay #1	____/15
Essay #2	____/15
Recommendation	____/10
Application	____/10

Total b ____/100

Rank ____/____

Comments:

2. In addition to the interview, award points for the letter of recommendation, essays, and application information such as GPA, extra curricular activities, etc. Board members prior to the committee convening may score applications.

3. The Military Personnel Officer, or in his absence the Educational Services Officer, will head the selection committee. The committee will consist of up to five additional personnel as designated by the MILPO, ideally including a field grade and company grade officer, NCO, enlisted soldier, and a civilian.

4. At a time designated by the MILPO the selection committee will meet to review, and grade applications, and select scholarship winners. The President of the Board will announce the number of scholarships to be awarded. The committee members will then present the number of applications they reviewed and the number of applicants that they feel deserve the scholarship. If the number of deserving applicants exceeds the number of scholarships available, the President will open the applications for discussion and a vote will be taken as to whom will be selected as scholarship recipients. The results of the committee will be approved by the MILPO prior to any decision being released.

