

## **Richmond Waldorf School Tuition Adjustment Policy**

Richmond Waldorf School is committed to a tuition adjustment program to help RWS parents meet their financial obligations for a Waldorf education.

Each family's financial contribution to the school is important. Your child's tuition adds to the welfare of our community. The health of our school also depends on the involvement of our parents and wider community and we ask you, just as we ask everyone else, to consider volunteering your help with fundraising events, as well as with tasks at the school. This assistance helps bridge the gap between everyone's contribution and the school's expenses.

In 1923, Rudolf Steiner gave the following verse to Ralph Courtney for the Threefold Group. Ralph Courtney was the co-founder of the Threefold Group, which later bought acreage in Spring Valley, New York. Today, Green Meadow Waldorf School, Sunbridge College, The Fellowship Community and Spring Valley Eurythmy School are some of the organizations based in this area.

*May our feelings penetrate  
Into the center of our hearts  
And seek in love to unite ourselves  
With the human beings who share the same goals  
And with spirit beings  
Who, full of grace,  
Strengthen us from realms of light,  
Illuminate our life in love and  
Gaze downward upon  
Our earnest heart-felt striving*

### **Responsibility of the Tuition Adjustment Committee (TAC)**

The RWS Board of Trustees develops guiding principles concerning tuition adjustment. The Tuition Adjustment Committee, composed of members of the Board of Trustees, parents and community representatives, administers the program and establishes procedures. All information regarding tuition adjustment is confidential. Admission to the school does not include consideration of a family's ability to pay the costs of attending RWS.

The TAC receives requests for tuition adjustment, evaluates the means and needs of requesting families, and provides adjustment accordingly. The TAC bases its assessments on financial information provided by the families, tax returns, computations from the School and Students Service for Financial Aid (SSS) and, if needed, meetings with the families. The TAC offers adjustments by considering the applicants need in relation to other applicants' needs and the tuition adjustment budget.

## **Responsibility of Families**

The school recognizes that the primary responsibility for financing a child's education rests with the family. The school expects that parents pursue other ways to make tuition payments before turning to the school for tuition adjustment. When a family has exhausted other channels, they should apply for tuition adjustment through the TAC. The school is not in a position to guarantee tuition adjustment for every year of a child's enrollment.

## **Eligibility**

1. Tuition adjustment is available to students enrolled:
  - In the grades
  - In the kindergarten program and who are expected (by birth-date) to enter 1<sup>st</sup> grade the following year
  - In the kindergarten and who have siblings in the grades.
2. A family will receive all other tuition discounts including but not limited to multi-child discount and tuition remission before being considered for tuition adjustment.

## **Application Forms and Documentation**

The TAC bases its decisions about tuition adjustment on information from:

1. School and Student Service for Financial Aid (SSS) forms. These forms must be submitted directly to SSS for processing – either on-line or through the mail. The on-line form costs slightly less and is considerably faster. (3 days vs. 2-3 weeks). Note: Self-employed parents must complete a Business/Farm Statement supplementary form, which is available in the office.
2. Photocopies of the most current Federal tax returns and W2s for each parent and each child for whom a return must be filed.
3. RWS Tuition Adjustment Application.
4. Either party may request a conversation between the family and TAC representatives.

The SSS is part of the Educational Testing Service in Princeton. It is a national service for independent schools that provide tuition assistance/adjustment. SSS performs calculations and offers guidelines for the TAC, based on the information provided by the applicant family. SSS does not make decisions for the school about the amount of adjustment, nor does it offer any form of assistance. The TAC bases its decisions on the need indicated by SSS, and on the tuition adjustment budget in relation to all other requests.

Applicants must send the appropriate forms to SSS with a processing fee or submit and pay on-line, as noted in the instructions. Please be sure to fill out the forms completely, as incomplete information may cause a delay in processing. An applicant's award will be jeopardized if the TAC does not have the SSS reply and copies of the tax forms in advance of its meetings to determine adjustment eligibility and amounts. *The form asks for our school code, which is 1672.*

SSS suggests that parents complete and return the forms at least four weeks before they are needed at the school. If 2008 tax returns are unavailable; the family may use an estimate of their 2008 taxes to fill out the form. Final 2008 tax returns must be submitted by April 16. If the final tax return is significantly different from what was used to fill out the SSS forms, the family must provide a written explanation and may be asked to submit a revised Parent Financial Statement to SSS.

**If a family needs help with the SSS forms, or has a question, please leave a written request, addressed to "The Tuition Adjustment Committee" and place in the mailbox outside of the Administration office. A TAC member will contact the family and, if necessary, an appointment will be set with a TAC representative to assist with the forms.**

### **Documentation from parents not married or not living together**

Tuition adjustment is determined by the family's ability to meet educational expenses. In families where parents are not married or not living together, we may ask that both custodial and non-custodial parents fill out separate applications. Generally, if there is a child support agreement in place, the amount can be indicated on the form/application. If there is no support agreement, then both parents will need to fill out the SSS forms and provide tax returns. It is the responsibility of the custodial parent to send forms to the non-custodial parent. Occasionally a custodial parent who does not communicate with the non-custodial parent may ask the TAC to send the forms. Please contact the TAC to request specific arrangements.

### **Tuition Adjustment Process**

Once a family has completed the appropriate forms, please make a copy of them. Mail the original SSS forms and deliver the duplicates, copies of tax returns, W2s, and the RWS Tuition Adjustment Application to the TAC box in the Finance office. In cases where the TAC determines that a meeting is required in order to better understand the needs and situation of a family, a member of the TAC will contact the family to schedule a meeting at the school.

The full TAC will meet to determine the final awards. A family may contact the TAC with further questions or concerns, or submit a written appeal of the final decision.

## **Timeline**

- January 12 Tuition Adjustment packets will be available in the office
- February 23 Deadline to mail or submit on-line SSS forms and submit application and copies of SSS forms to RWS – Attention Tuition Adjustment Committee
- April 16 Submit copy of finalized tax return if you have not already done so
- May 15 Notification of decisions/amounts sent by mail (we strive to notify as early in May as possible).

## **Financial Changes Mid-Year**

A family experiencing new financial difficulties after its adjustment eligibility and amount have been determined may apply to the TAC for additional adjustment. The family should mail or deliver a written, detailed description of the financial change, expected duration, possible solutions and specific amount of additional adjustment requested to the school's office. A family experiencing an improvement in their financial situation may elect to notify TAC with an offer to reduce the amount of the tuition adjustment awarded.

## **Final Thoughts**

The tuition adjustment program is evolving and the TAC is always reviewing and revising procedures to improve our service to our community. If you have suggestions, concerns or would like to propose additions or changes, please submit them to the committee in writing.