

Richmond Waldorf School Tuition Adjustment Policy

Richmond Waldorf School is committed to socioeconomic diversity. Each family's financial contribution to the school is important, and every child's tuition adds to the welfare of our community.

The health of our school also depends on the involvement of our parents and the wider community. We ask families applying for adjustment, just as we ask everyone else, to consider volunteering to help with festivals and fundraising events as well as other activities at the school. Volunteer assistance is essential to the vitality of RWS and builds community. Parent volunteerism helps bridge the gap between everyone's contribution and the school's expenses.

Responsibility of the Tuition Adjustment Committee (TAC)

The Tuition Adjustment Committee is a committee of the RW Board of Trustees. All information about Tuition Adjustment is confidential. Applicant families are assigned a number that corresponds with the request for adjustment, and no identifying information is provided to the Tuition Adjustment Committee.

The Committee 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 each applicant family's need in relation to other applicants' needs and the tuition adjustment budget.

Responsibility of Applicant Families

The school recognizes that the primary responsibility for financing a child's education rests with the family. The school expects that parents pursue all other sources of help to make tuition payments before turning to the school for tuition adjustment. When a family has exhausted other channels, they may apply for tuition adjustment through the TAC process. Not all families will necessarily be awarded adjustment, and the school cannot guarantee tuition adjustment for every year of a child's enrollment.

Eligibility Considerations

1. Tuition adjustment is available to currently enrolled students who demonstrate financial need.
2. Tuition adjustment is available to new families seeking to enroll their children who qualify and who have completed the application process.
3. A family will receive all other tuition discounts for which they are eligible including but not limited to multi-child discount and tuition remission before being considered for tuition adjustment.
4. Tuition adjustment is only available to children enrolled in or entering
 - a. the grades program
 - b. the kindergarten program if their child is expected to enter the first grade the following year or has an older sibling in the grades program

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 online or through the mail.
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

The SSS is part of the Educational Testing Service in Princeton. It is a national service for independent schools that provide tuition adjustment. SSS performs calculations and offers guidelines for the RWS Tuition Adjustment Committee, 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 online, 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 2014 tax returns are unavailable; the family may use an estimate of their 2013 taxes to fill out the form. Final 2014 tax returns must be submitted by April 15. 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 send an email or leave a written request, addressed to “The Tuition Adjustment Committee” to the Operations Manager, admin@richmondwaldorf.com. 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 Operations Manager, admin@richmondwaldorf.com to request specific arrangements.

Tuition Adjustment Process

Please deliver copies of tax returns, W2s, and the RWS Tuition Adjustment Application to the Front 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 in the spring to determine the final awards. Awards will be communicated to applicant families by the school in writing. A family may contact the TAC with further questions or concerns, or submit a written appeal of the final decision. Appeals are considered by the Executive Committee of the Board of Trustees.

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. Please be aware, however, that there are times when the entire allotment of adjustment for the year has been expended. Nevertheless, the family should mail, email 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 to the attention of the Operations Manager.

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.

Tuition Adjustment Summary

Here is a brief summary of the policy points that are used to guide the Tuition Adjustment Committee's decisions.

Responsibilities of families:

- Demonstrate need based on tuition adjustment forms (SSS) and other required documentation.
- Verify that all potential financial resources have been investigated and determined to be unavailable.
- Demonstrate reasonable efforts to improve the family's means with regard to ability to pay with the goal of decreasing the amount of assistance required.
- Must be current on all tuition and fee payments to apply for adjustment for the following school year.
- Must submit tuition adjustment forms by deadlines.

By March 2, 2015

- Submit SSS forms and application fee to SSS online.
- Submit a copy of the SSS forms and the RWS application to the RWS. Place information in an envelope addressed to "TAC" and place the envelope in the Office Mailbox downstairs (at the far end of the family mailboxes)

By April 15, 2015

- Deliver copies of final tax returns and W2s to RWS, if they have not already been provided.

Required documents include:

- Copy of the SSS Parents' Financial Statement form.
- Copies of tax returns and W2s.
- RWS Tuition Adjustment application form

The following are conditions that disqualify a family from consideration:

- Payment of tuition or other fees is delinquent according to the terms of the enrollment contract for the current school year.
- Tuition adjustment forms are not submitted by the deadline.
- Failure to meet with Tuition Adjustment Committee representatives if this is requested.

Additional points:

- Priority consideration is given to returning and grades students.
- Tuition adjustment is generally available only to those kindergarten children who are expected to enter the first grade the following year or have siblings in the grades.
- Tuition adjustment amounts generally do not exceed 45 % of the first child or 50% of the subsequent child(ren) total tuition costs.
- All information submitted to the Tuition Adjustment Committee is strictly confidential. Applicants are also expected to maintain confidentiality and refrain from discussing with uninvolved parties financial and other information related to tuition adjustment awards and decisions.

Completing SSS Application

Thank you for your interest in Richmond Waldorf School for the 2015-16 school year. You may begin to apply for tuition adjustment starting on November 1, 2014, as described below. To be eligible for consideration for financial aid at Richmond Waldorf School, you must complete your application by March 2, 2015. For applicants enrolling after March 2nd, please submit your application immediately.

We use School and Student Services (SSS) to process our financial aid applications. SSS is a service of the National Association of Independent Schools. Based on the financial information you provide, SSS gives us an estimated amount that your family can contribute to educational expenses. This helps our school make fair and objective financial aid decisions. To begin your financial aid application for the 2015-16 enrollment year, follow these steps below.

Note: Please apply for financial aid online as your information will be delivered accurately and quickly to our school, allowing us to make a quicker decision about your eligibility for financial aid.

ONLINE:

Our School Code is 1672.

1. Starting on November 1, 2014, go to sss.nais.org.
2. Click on the prompt to begin your Parents' Financial Statement (PFS). You only need to complete one PFS even if you have several children applying to our school.
3. You will be given a username and password that will allow you to return to your PFS at a later date before submitting it. Information will be secure.
4. You will be given instructions about submitting backup documents. At Richmond Waldorf School, we require the RWS application and copies of your tax return and W2s.

BY MAIL

1. If you don't already have a printed Parents' Financial Statement (PFS), call our school at 804.377.8024, ext. 102 or go to our website at <http://www.richmondwaldorf.com>
2. Complete the PFS and return it to School and Student Services by NAIS, Application Processing Center, Post Office Box 449, Randolph, MA 02368-0449 USA.

Call (800) 344-8328 with any questions.