

Hawthorne Valley Waldorf School

Tuition Adjustment FAQ

HVS Board Tuition Adjustment Commitment

Hawthorne Valley Waldorf School (HVS) is committed to economic and social diversity in its student body. There is Tuition Adjustment (TA) available for families with demonstrated economic need. We are committed to a need-blind admissions policy and a purely need-based TA policy. TA is awarded based solely on a family's ability to pay tuition and has no merit-based component.

HVS considers it a high budgeting priority to make Waldorf Education available to our families. To this end HVS commits approximately \$1.8 million of unrealized income to provide TA for approximately 66% of the families at the school. Despite this significant financial commitment, the combined high level of financial need and the number of families requesting TA annually, means there is not enough income to meet every family's tuition needs.

Whilst the TA program helps many families, financing a student's independent school education rests primarily with the family, including non-custodial, separated, and divorced parents.

Given the limited TA budget pool, it is essential that school families seek appropriate and reasonable means for contributing the maximum level of tuition possible so that the school can be financially sustainable and continue to adequately support our talented and dedicated faculty and staff to provide a rich and varied Waldorf educational program for all of our children.

We hope that the following commonly asked questions and answers will help you to better understand HVS's TA program:

1. Q: Who is eligible to apply for tuition adjustment?

A: All families who can demonstrate economic need are welcome to apply. Eligibility is determined by the Tuition Adjustment Committee during the regular TA cycle (February applicants) outside of this timeframe our Director of Finance and TA Administrator jointly make TA decisions based on the standards set by the TA Committee for the year.

2. Q: What criteria is eligibility based on?

A: A family's total income, assets, and expenses are considered. Relevant information from all parents/guardians, including those who are divorced, separated, or never married, and non-parent spouses/partners, should be included in the application. It is expected that parents are working to capacity to provide the highest level of tuition they can achieve. For families with children in grade two and above with only one parent working full time, the Committee will assume that the non-working parent could also be contributing financially. Exceptions to this expectation will be made on an individual basis.

3. Q: Who is required to complete the forms?

A: All parents or guardians, including those who are divorced, separated or never married, and non-parent spouses/partners are required to contribute relevant information as part of completing the forms. If a special circumstance precludes the other parent or guardian from participating in the TA process, an explanation and documentation will be required.

4. Q: What is the tuition adjustment process?

A: The process for the 2019-2020 school year is as follows:

- A completed application through TADS.com must be submitted including answers to all supplementary questions by March 1, 2019.
- All required documents, complete business and personal taxes including all schedules, W2, 1099, and any other relevant documentation must be submitted. Prior year taxes may be submitted with the application, however current year taxes will be required.
- The TA committee will review all applications March 1-March 25. After Committee review, discussion, clarification, and comparison to similar family situations, decisions will be reached on the amount of the need-based award.
- Families will receive an enrollment contract with their award amount by the end of March.

5. Q: What if I miss the March 1 deadline for application?

A: For returning families, late applications will still be reviewed but may not receive as much aid due to the limitation of funds. For new applicants the committee will reserve a limited amount of funds so that they can be evaluated according to the criteria as the full pool of applicants. Applications received after June 15 may be limited to a 50% maximum award.

6. Q: Who is on the Tuition Adjustment Committee?

A: The Tuition Adjustment Committee is a volunteer advisory group to the HVA Board of Trustees which is mandated to review TA applications and determine the tuition levels based upon a family's ability to pay and the financial needs of the school. Members are chosen from outside HVS faculty, staff, and parent/volunteers working for the school.

7. Q: How does the Committee work to fairly divide the financial resources available for tuition adjustment?

A: The Committee seeks to find parity and equal review amongst all the families applying for an adjusted tuition. Each application is reviewed in the context of the whole community of applicants and allocated budget available for Tuition Adjustment. This may constrain the committee with regard to the amount that each family can be awarded and it may vary annually. The Committee is charged by the Board with responsibly meeting the budgetary needs of the School. Selected Board members meet with the volunteer TA Committee following each award season, to review the process.

8. Q: How do I know what the School's financial situation is annually?

A: The school will present its current year's budget annually to interested community members in the winter session.

9. Q: Is anyone else involved in the review process?

A: Due to the large volume of applications and the limited time of the volunteer committee members, some applications and those received after the deadline may be reviewed by the Director of Finance and TA Administrator in close liaison with the TA committee.

10. Q: If no adjustment is granted, or the TA determination received is less than I require to enroll, what should I do?

A: It is important to note that a request to review or appeal a TA determination will only be considered where a change in circumstances has occurred or relevant financial information has come to light since submitting the application. If these conditions are met, you may write a letter requesting the Committee to review your TA determination. This letter should outline any changes in circumstance, expenses, or financial obligations omitted from your original application and should include the amount of additional support you are seeking. Your request will be carefully reviewed. Following the review of your letter you may be invited for a conversation with an external professional designated by HVS to review TA determination appeals. Please note that any change to a TA determination following an appeal will depend on the availability funds remaining in the TA pool. Requests for a review must be submitted to the TA Administrator within two weeks of receiving your adjusted tuition contract.

11. Q: If my financial situation changes due to increased expenses, i.e. major home repairs such as a roof or furnace; the need to purchase a new vehicle or orthodontics for a child, after I have submitted my application for an adjusted tuition or later during the school year, would this qualify for an appeal of my Tuition Adjustment?

A: No. These type of events are considered to be in the normal range of unexpected expenses that occur in the course of home and/or vehicle ownership and raising a child(ren). Therefore, it is expected that families will manage their finances in such a way that these type of expenses can be covered when needed.

12. Q: If my financial situation changes significantly due to a major life change (job loss, medical crisis, or divorce) at any time after I have submitted my application for an adjusted tuition or later during the school year what should I do?

A: Yes. If there is a significant change in your financial circumstances at any point after you have received your adjusted tuition determination or during the school year you may request a review of your situation to see if a further adjustment is appropriate. Requests should be made in writing to TAadmin@hawthornevalley.org. Examples of unfortunate situations that might qualify for a re-review would be those of a major life change such as a job loss, medical emergency, a change in marital status, etc. Conversely, should your situation change in a more beneficial direction such as from a job promotion or other significant increase in income you should also be in contact to have a review so that you are contributing to tuition at an appropriate level.

13. Q: Will my tuition level change if I add or withdraw a child from school during the contracted school year?

A: If a student is added during the school year, your adjusted tuition amount will be reviewed and may include an increase.

If a student is withdrawn during the school year, your contracted tuition amount will not decrease unless the contracted amount for all the students is greater than the full tuition cost of

the remaining students. For example, if the full tuition for three students is \$60,000 and a family's adjusted tuition is \$50,000, if one student is withdrawn and the remaining full tuition would be \$40,000, a refund would be given. However, if the original adjusted tuition amount is \$35,000, there would be no decrease in tuition as the amount is less than the full cost for the two remaining students. If you incur tuition costs for the withdrawn student, these will be reviewed upon request and may result in a change in your tuition adjustment and contract.

14. Q: Will my tuition level change in subsequent years?

A: Families should expect an annual increase in tuition based on increased costs for the school. This increase is also affected by the number of children and grade level of students in a family. A typical annual increase ranges from 3-5%. If a family's circumstances significantly change, tuition may increase or decrease accordingly.

15. Q: Who do I contact if I have further questions?

A: All tuition adjustment questions can be directed to **Lauren Wolff**, TA Administrator, TAAdmin@hawthornevalley.org, 518-610-3179.