KIMBERTON WALDORF SCHOOL

Tuition Assistance Policies and Procedures

Philosophy

Kimberton Waldorf School values and actively seeks a student body that reflects the ethnic, racial, cultural, and socioeconomic diversity of the area. Our program of tuition assistance supports this diversity by making the school more accessible to families of varying economic backgrounds. The school also recognizes that the primary responsibility for financing a student's independent school education rests with his or her family. Tuition assistance is granted on the basis of need which is determined by the income, assets, liabilities and other information reported in the online application through *Clarity*. **It is expected that parents applying for tuition assistance will first assess their financial status and turn to other sources before asking Kimberton Waldorf School for assistance.** While our aim is to assure the possibility of Waldorf Education to all of our students, our ability to do so is limited. Assistance comes in the form of tuition reduction and is supported by fundraising efforts, EITC, investment income, and other programming income. As a result, the school is not in a financial position to support lifestyle choices that have a negative impact on the family's ability to pay tuition. We expect all parents to contribute honestly toward tuition, including seeking employment in order to help defray school costs.

Tuition

Tuition fees at Kimberton Waldorf School are considered as support to the functions and operations that support the mission of the school. Tuitions rates are set in December each year. Student Enrollment Agreements are sent out in January and are due back in February.

Tuition Payment Plans

Payment plans are arranged in a one-pay, two-pay or ten-pay agreements. One-pay payments must be paid by July 1. Families who choose the one-pay arrangement may choose to purchase tuition insurance or opt out of it and sign a waiver. Two-pay payments are made by July 1 and January 1; it is required that tuition insurance be purchased through the school. Ten-pay payments are made by the 1st or the 15th of each month from July through April; tuition insurance is required.

Delinquent Accounts

Delinquent accounts are addressed in the following way: If a payment is rejected, FACTS will automatically generate an email to the family to notify them of the updated payment date, (10-15 days later). FACTS will charge a $20 NSF fee each time if the payment was set up from a bank account. There is no fee for rejected credit card payments. FACTS will make up to three attempts to process payment. After the 3rd attempt is rejected, a notice is sent from the Business Department as a reminder

of the amount due and the consequences of student dismissal for not paying the student's tuition. If no payment is received within one week after the letter is sent, a second letter is sent by the Board of Trustees and a telephone call is made. If payment has not been received or mutually agreeable payment arrangements have not been made at that time, the family is notified of dismissal of the child(ren) verbally and by certified letter. Per the terms of the enrollment contract, withdrawal or dismissal does not relieve the responsibility to pay the balance of the tuition contract; dismissal for non-payment is simply the mechanism by which the school stops providing services to families who are in breach of their contract.

Tuition Assistance

Tuition assistance at Kimberton Waldorf School is need-based; amounts awarded are based solely on demonstrated financial need. Tuition assistance is available for students in all grade school classes as well as those enrolled in full-day Rosebud and Kindergarten programs for 4 or 5 days a week. Admission decisions are made separately from decisions regarding tuition assistance. Awards are determined by the Tuition Assistance Committee. In determining awards, the Committee relies upon the expected family contribution as calculated by Clarity, the family's submitted forms, and any special financial considerations communicated by the family. Final assistance decisions are based on the Committee's assessment of the family's needs, the number of applications, the needs within specific classes, and the overall needs of the school as reflected in the budgeted funds available. There is always a greater demand for assistance than there are resources. Because the demand for assistance is high, families are advised that they may need to seek additional resources to supplement the offers they receive from the School's tuition assistance program. In most cases, the school can meet only a portion of a family's need as calculated by *Clarity*.

Tuition assistance must be applied for annually. While the School cannot guarantee the same level of financial support beyond any single year, the goal is to continue offering an award consistent with a family's demonstrated need whenever possible.

Information related to tuition assistance is kept in strict confidence and students receiving assistance are not held to different academic or behavioral standards. The school allocates tuition assistance systematically, with priority given first to returning students, followed by new students. In order to be considered for tuition assistance, the payment of open tuition balances must be current. Families requesting need-based support are not required to make a binding commitment to the School until a decision has been reached regarding their tuition assistance application.

Appeals of tuition assistance awards must be made in writing to the Tuition Assistance Committee and must include additional information and/or description of special circumstances that occurred since the submission of the original application.

The membership of the Tuition Assistance Committee may consist of staff, current and/or prior Board Members, and alumni. Members are kept confidential. The criteria for membership include knowledge of financial matters, the capacity for objective decision making and a willingness to uphold the philosophy of the school's Tuition Assistance program. The Tuition Assistance Committee makes need-based assistance awards using required financial documentation provided by parents.

Guidelines

- New families are eligible to apply for tuition assistance upon acceptance to the school. Mid-year acceptances will be considered if funds remain.
- Applications from current families must be received by the January deadline. Late application will be reviewed when the process for timely application has been completed. Any remaining funds will then be awarded to qualified late applicants.
- It is not possible for the Tuition Assistance Committee to become involved in any financial arrangements between parents. Both Custodial and Non-custodial parents are expected to contribute financial documentation to the Tuition Assistance Committee.

Procedure

- Complete Clarity application accurately and appropriately for your family's circumstances.
- Submit additional documentation as required by the online application and allow access of IRS tax forms:
  - A copy of the prior year final paystub or (if available) Form W-2
  - A written explanation of any special circumstances you want the Tuition Assistance Committee to be aware of.

Please note that incomplete or delayed information regarding any of the above items may result in a reduction in the amount of tuition assistance offered.

If no assistance is granted or the award is less than required, a written letter of appeal may be submitted to the Tuition Assistance Committee. The deadline for appeal is included in the contract. This letter should outline any expenses or financial obligations which were omitted from the original application. The amount of additional assistance in order to make it possible for enrollment in the school should be included. Appeal applications extend the deadline for a family's contract return until two weeks after the appeal has been responded to. The possibility of appeal offers depends on the availability of funds. The Director of Enrollment notifies a family of the most recent decision within two weeks of the appeal deadline. Acceptance of final awards made by the school must be received by the Enrollment Office within 14 days of the notification date; if there is a lack of written acceptance, it is assumed that the award was denied and the funds become available for consideration to other families.

If you have any questions or need assistance, please feel free to call the Business Office at 610.933.3635 ext. 123