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**Tuition Assistance Instructions and Form 2020-2021**

During the enrollment process you indicated that your family may be in need of Tuition Assistance (TA). Before applying for TA, it is important for your family to understand The Waldorf School of San Diego’s (WSSD) Tuition Assistance program and process. In addition, your family must meet specific eligibility criteria delineated in the online TADS platform. Please read through this information very carefully and initial the appropriate boxes to confirm that you understand the TA process and agree to the TA requirements.

**Tuition Assistance Program**

The Waldorf School of San Diego offers an extraordinary curriculum rich in the arts, music and movement as well as a strong program of academic subjects. WSSD is committed to inclusivity and is dedicated to enabling all those who are committed to Waldorf education to be an integral part of our school. Our community acknowledges that it is stronger when it encompasses families from all socio-economic backgrounds. We are proud to offer Tuition Assistance at our school.

We strive to balance TA funding with our fiscal responsibility to support the entire school. Unlike traditional parochial, charter or public schools, our school does not receive outside funding nor does it have an endowment. Therefor the operating costs of the school, including faculty and staff salaries, curriculum and programs, facilities maintenance and improvement, etc., are mostly funded by tuition income.

Tuition Assistance is granted to those families in our community demonstratingdocumented financial need*.* Assistance is awarded on *a first-come, first-served basis* to applications which have been submitted complete and on time. Our TA funds are finite and thus cannot be guaranteed in any particular case. New, qualifying families who receive tuition assistance will have to pay, *at a minimum*:

* 60% of tuition in the Kindergarten and Elementary Grades 1-8
* 50% of tuition in the High School

Also, please note that Tuition Assistance is not available in the Morning Glory Playgroups or in the Nursery programs. Families receiving tuition assistance do not qualify for sibling discounts. And Tuition Assistance does not apply to the Non-Refundable Tuition Deposit, the Hot Lunch Program, or Extended Care.

**TA Process**

The TA Process at The Waldorf School of San Diego uses a third party service provider called Tuition Aid Data Services company (commonly known as TADS) to collect and process information about your annual finances and your ability to pay tuition. The entire online TA Application takes approximately 20 minutes to complete.

Once the online application has been submitted, you must still provide the required supporting documentation. At a minimum, this will include a Letter of Request addressed to the TA Committee explaining in detail the reason for your request, most recent tax returns, W2 and pay stub as well as proof of any outstanding debt. Once your application is considered complete and in good standing by TADS, it takes approximately 2 weeks for TADS to audit the application and make a recommendation. Only then will your application be added, *in the order it was received*, to the Tuition Assistance Committee’s agenda. Please note that all of your personal information is held in the strictest confidence.

The Tuition Assistance Committee is a confidential group comprising members of the faculty, the Circle of Trustees, and the parent body. The Committee makes an independent determination based on TADS’ assessment, the Letter of Request, and any other information provided by the applicants. The TA Committee reserves the right of absolute discretion on the provision of TA. In order to offer a fair and unbiased review process, both the TA Committee’s membership AND the identity of TA applicants are held confidential and anonymous. Because the process is blind on both sides, communication between the two groups is facilitated by the Tuition Assistance Liaison. All questions and documentation for the TA Committee must be submitted to the TA Liaison at ta@waldorfsandiego.org.

During the month of March and April, the TA Committee members will determine eligibility to the TA program and the TA Liaison will notify the applicants of their decision by email. If your family is awarded TA, you will receive an Amended Tuition Contract and have 5 days to return it otherwise your application will be withdrawn and the funds redistributed. If your family does not qualify for TA, you have the option of accepting or declining the *full pay* contract that was originally signed during enrollment. This must be done within 5 business days of notification.

Once the contracts have been returned to the TA liaison, the Business Manager will update your 2020-2021 Tuition Agreement. Please note, that under your enrollment contract, full tuition payments will be due beginning in July 2020, until your TA process is complete.

For new families ONLY: Upon acceptance of your child, you will receive an email to register your child(ren) on-line. This initial contract will be based on full tuition and must be signed and submitted within 2 weeks of receipt. Once your TA application has been processed, you will sign your Amended Tuition Contract reflecting your reduced tuition amount within 5 business days of notification. Any contract not signed and returned within 5 days will be withdrawn, and the tuition will revert to the original full pay contract. Again, if your family does not receive an adjustment in tuition, you will have the option of accepting or declining the *full pay* contract that was originally signed. This must also be done within 5 business days of notification.

Your child may not begin school in September 2020 until your Amended Tuition Contract OR acknowledgement letter (if your family is not eligible for TA) has been completed and signed AND your TADS Tuition Payment Agreement has been set up.

**Please review and initial each statement to indicate your understanding and agreement.**

\_\_\_\_\_ I agree to submit a Letter of Request for Tuition Assistance to the school explaining in detail why my family needs Tuition Assistance.

\_\_\_\_\_ I agree to an independent in-depth analysis of parents’/guardians’ finances and assets by both TADS and the TA Committee in order to determine my family’s eligibility for Tuition Assistance.

\_\_\_\_\_ I understand that, regardless of custody, BOTH parents/guardians are required to complete a TADS application (dual households may complete separate applications).

\_\_\_\_\_ I understand that, my TA award and the monthly payment amounts are based on my family’s ability to pay, regardless of the number of children attending WSSD.

\_\_\_\_\_ I understand that if only one parent is gainfully employed, and if there are no dependent children at home under 4.5 years old, TADS will add into my application an imputed income equivalent to a full-time minimum wage. (This practice is an industry standard based on TADS recommendations and other independent schools.)

\_\_\_\_\_ I understand that WSSD’s priority is to award assistance to the families with the most need. Lifestyle choices that result in increased expenses or decreased discretionary income cannot be underwritten by WSSD.

\_\_\_\_\_ I understand that TA is not normally granted to families who experience a reduction in income out of choice (for example, giving up employment to go back to school or start their own business.)

\_\_\_\_\_ I understand that approval for TA requires that a Waldorf education be among my family’s highest priorities for discretionary spending.

\_\_\_\_\_ I understand that the TA Committee will take into consideration my liquid assets, retirement

 account balances, and retirement account contributions in its evaluation of my TA application.

\_\_\_\_\_ I agree to provide TADS with a Letter of Request describing in detail the reasons my family is

applying for Tuition Assistance.

\_\_\_\_\_ My family does not hold any liquidable assets in excess of 3 months income, nor does my

family hold retirement assets/accounts in excess of $100,000.

\_\_\_\_\_ I agree to inform WSSD if our family income increases at any point during the school year.

\_\_\_\_\_ I understand that, at a minimum, our family will be expected to increase tuition payments each year by the standard school-wide annual percentage increase.

\_\_\_\_\_ I understand that Tuition Assistance agreements are held in the strictest confidence with a deep respect for privacy. I agree to maintain this confidentiality or lose my TA Contract.

\_\_\_\_\_ I understand the deadlines associated to the TA application are:

* Re-enrolling students**: Friday, January 31st at 3pm PST**
* New students: Within **ONE WEEK** of submitting a student application.

\_\_\_\_\_ I understand that during the enrollment process, I will be asked sign a Tuition Contract at full tuition and to pay the tuition deposit. Later if I do not qualify for TA, I will have the option to decline or accept this initial contract, but the deposit will remain non-refundable.

\_\_\_\_\_ I understand that the Tuition Payment Agreement in TADS must be set up in TADS by June 1, 2020.

\_\_\_\_\_ I understand that should I fail to complete the TA process on time, I will be responsible for full tuition payments beginning in July 1, 2020.

\_\_\_\_\_ I understand that, as a new applicant to TA, at a minimum, I will have to pay:

* 60% of tuition in the Kindergarten and Elementary Grades 1-8
* 50% of tuition in the High School.

If you have any questions regarding any of the stipulations above, please contact the TA Liaison at ta@waldorfsandiego.org.

By signing my electronic signature below, I understand and accept the TA program requirements and process.

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