

**POLICIES OF THE GREAT BARRINGTON RUDOLF STEINER SCHOOL
TUITION ASSISTANCE COMMITTEE FOR THE 2011 - 2012 SCHOOL YEAR**

Dates to remember for families applying for tuition assistance:

- Jan 28 Tuition assistance applications available in the Business Office
- Jan 28 Tuition contracts sent to all families with students currently enrolled
- Feb16 Deadline for submitting completed tuition assistance application form to school business office. Application includes photocopy of 2010 (or 2009) IRS Form 1040 with all accompanying schedules, most recent property tax assessments and any other information that may help the committee in evaluating a family's situation
- Feb/Mar Interviews (if necessary) – by parent or committee request
- March Contracts reflecting tuition assistance mailed
- March 31 All contracts with accompanying non-refundable enrollment deposit due:

New Students

Deposit for new applicants	\$500 per student
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Returning Students

Deposit for one returning student	\$200
Deposit for 2 or more students	\$250 per family

Tuition assistance applications for new students who are accepted into a class after the above dates will be reviewed on a revolving basis. Once a completed tuition assistance application and the deposit are received, a contract will be issued within two weeks. Parents are responsible for the \$500 non-refundable enrollment deposit in advance. This deposit will only be refunded if the family is unable to attend due to financial reasons.

GENERAL TUITION ASSISTANCE POLICIES

1. Timelines for completing and submitting tuition assistance forms:
The school strives to make the enrollment process as smooth and efficient as possible. In order to project near accurate revenue and staffing requirements, it is imperative that we determine enrollment in the school as close to actual as possible. Please pay close attention to the checklist on page one of the application and complete all pages entirely. Incomplete applications or blank spaces will impede the tuition assistance process.
2. Adjustment of housing costs:
Some families receive free or subsidized housing in lieu of pay for services they provide. To ensure fairness in determining what families of equal income should receive as tuition assistance, a housing cost, representing low estimates of what monthly housing costs are in this area, should be calculated by the applicant. A local realtor could be contacted to provide cost estimates for this purpose. This monthly housing cost schedule will be added to the family's income in determining financial need. The applicant is asked to make a notation in the special circumstances section to show the calculation.

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3. Adjustment of other services received in lieu of payments:

As explained above, the tuition assistance committee desires to treat all families as fairly as possible. When services (food, automobile, electricity, etc.) are provided to a family in lieu of income, a minimal cost comparable to the cost of the free services will be added to the family's income when determining eligibility.

4. Establishing home values:

For families who own homes, a copy of the most recent property tax assessment will be required with their application. Applicants may choose to use a recent appraisal or tax assessment to determine home value. Home equity is calculated by subtracting any liability from your home value. *Example: Appraised value of \$250,000 less mortgage balance of \$150,000 = \$100,000 of equity.*

5. Divorced or separated families:

Tuition assistance at GBRSS is determined by a family's ability to meet educational expenses. In general, it is the position of this school that divorced or separated parents retain the obligation to contribute to the education of their children whether or not there is a legal obligation to do so. Both natural parents should, therefore, provide financial information that is requested by the school each year. If however, the custodial parent has remarried, the stepparent's financial information may be provided in lieu of that of the non-custodial parent.

6. Minimum family income:

Over the years, the committee noticed that in some families, both parents worked to enable their child to attend the Rudolf Steiner School; in other families, only one parent worked. We also noticed cases in which a parent, in his or her own business, earned less than the minimum wage for full time work.

While not trying to dictate what kind of work an individual should be doing, we believe that in fairness to all parents, and in order to make the best use of tuition assistance funds, the following policies should be set:

In a two-parent family, if the major wage earner earns less than \$16,640, we will substitute \$16,640 for that individual's income. (This works out to be \$8 per hour for 40 hours a week x 52 weeks a year.)

In a single parent family, if child support and wages equal less than \$8,000 we will substitute \$8,000 for that individual's income.

If there are extenuating circumstances that influence minimum family income, then a written explanation should be included with the application.

7. Range of aid given:

The range of aid given generally falls between 5% and 40% of the total tuition cost for a given family. The tuition assistance committee will, under unusual hardship conditions, provide aid of up to 60% of tuition costs. Special

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consideration will be given to families with more than two children enrolled in the school.

The committee understands that there are very rare circumstances in which a returning family may experience a temporary or one-time hardship. The family may submit in writing an explanation of this hardship. In these cases extra hardship allowance may be made. Documentation and a personal interview may be required.

Because the tuition assistance committee awards most of the allotted funds in March, the resources available for applicants after that date and for emergencies are limited.

There may be times when a family believes the application form does not give a complete picture of the family's circumstances. In these cases, the family is asked to include a written explanation of these circumstances with the submission of the IRS form.

The tuition assistance committee may request an interview with the family or may call a family to clarify certain aspects of its application.

Families may also request a personal interview or conversation to fully explain their circumstances.

The tuition assistance committee will award financial aid with the understanding that the aid will not be issued until any outstanding balance with the school has been settled.

Families receiving tuition assistance are not eligible for any additional sibling discounts.

Tuition assistance is granted toward the tuition costs of children in Nursery through Grade Eight. Tuition assistance is not available for the parent-toddler program or for extra-curricular activities such as music lessons.

8. Appeals to the Tuition Assistance Committee:

Reconsideration of the tuition assistance decision is made for those individuals whose financial status has significantly changed since the time of the application. If a family wishes to appeal its award, they have two weeks from the date the award was issued to submit a **written** appeal to the committee. Such an appeal should be based upon new financial information or a different interpretation of previous information.

9. Appeals to the Executive Committee

If a family believes that they need a further appeal, and they do not qualify for emergency funds, they may write a letter to the Business Manager, who will review the appeal with the Executive Committee of the Board of Trustees.

INTERNAL COMMITTEE POLICIES

The tuition assistance committee reviews all applications confidentially. The Business Manager assigns each family a number and the committee reviews the applications by number. When an interview is necessary, the family's name will be disclosed to the interviewers only.

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The committee uses a standard formula as a first step in calculating estimated awards. This formula, which was derived from the Princeton service formerly utilized, arrives at a figure that represents a family's "ability to pay". The final award is determined by the total amount of awards requested, the total available tuition assistance funds, and individual circumstances that might affect a family's situation.

If there is a change in the family's circumstances after the application process has been completed, or if additional information is made available to the committee, the Business Manager can recalculate the "ability to pay" figure, thereby arriving at a different estimated award to be presented to the tuition assistance committee.

PARAMETERS FOR THE USE OF EMERGENCY FUNDS

In any given year, a percentage of tuition assistance that is not awarded may be set aside for emergency funds. The exact amount will be determined by the number of applicants and the needs of the families requesting aid.

Emergency dollars are available to any family who can document a serious misfortune that impacts their ability to pay their current tuition bill. Misfortune includes: serious illness that impacts the ability of a tuition earning parent to work for over three months; death of an immediate family member; an accident that impacts the ability of a tuition earning parent to work for over three months; the loss of a full time job of a tuition earning parent as a result of the employer's decision; and/or a natural catastrophe (e.g. fire) resulting in a significant loss of necessary living arrangements.

A family that experiences a major change in its economic situation after its award has been granted may submit a new application explaining the altered circumstances any time throughout the school year. Families requesting help through the emergency fund may or may not be currently receiving tuition assistance.

Any family who has suffered a serious misfortune may contact the Business Manager in writing and request that their situation be considered for accessing emergency tuition dollars. The Business Manager will contact the chair of the tuition assistance committee and a determination will be made on whether the involvement of the committee is necessary. Once the Business Manager and the chair of the committee have the information they need, the Executive Committee will determine, in consultation with the Business Manager and the Faculty Administrator whether an award should be given and the amount. The Business Manager will notify the family of the decision.

In very serious situations, a member of the community may be the person to notify the Business Manager of the misfortune of another family.

The Great Barrington Rudolf Steiner School does not discriminate on the basis of race, color, gender, marital status, creed, learning disabilities or national or ethnic origin in the administration of its tuition assistance policies.¹

¹ Board approved 2/16/94; revised 2/4/98; revised 10/28/2003; revised 01/24/08; revised 1/27/09