



Halton Waldorf School

Inspired Learning

Tuition Adjustment 2023-2024

Halton Waldorf School is committed to making a Waldorf education affordable to all families, regardless of their economic status. The school is committed to assisting families with a demonstrated financial need to cover part of the cost of school tuition through our Tuition Adjustment Program, to a maximum of 50% of the base tuition. Within its resources, the school strives to support socioeconomic diversity in its community. Approximately fifteen percent of our families receive tuition assistance. The tuition adjustment budget generally accounts for 10% of the school's net tuition income.

Families qualifying for and receiving tuition adjustment must re-apply every year for consideration of financial support. Applications are processed for current HWS families before new applicants.

We use a third-party reviewer, **Apple Financial Services**, to assess tuition adjustment applications. The application and financial analysis are forwarded to the Tuition Adjustment Committee. All information is treated with discretion and kept confidential. Please apply in plenty of time to obtain approval.

Tuition adjustment is determined by considering the income and resources of applicants in conjunction with their assets and liabilities. As noted above, actual assistance provided is limited by the school's resources, and subject to the discretion of the Tuition Adjustment Committee. We expect parents to assess their financial status and turn to other possible sources of funds before asking the school for assistance. While our aim is to assure a Waldorf education for all students, our ability to do so is limited. Parents must shoulder the majority of their tuition obligation.

The Committee

The Tuition Adjustment Committee is a sub-committee of the board's Finance Committee, composed of staff and board members. 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 adjustment program. The committee reviews recommendations from Apple Financial Services and makes adjustments based on the required financial documentation provided by parents (see Procedure, below).

Program Guidelines

- A maximum of 50% can be offered in full-day kindergarten (half day KG is not eligible), grade and high school, but is based on the number of applicants and our budget
- A maximum of 25% can be offered for preschool if registered for the full-day program, the half-day program is not eligible
- Tuition adjustment applications to Apple Financial can be processed starting February 15, 2023 for the 2023/24 academic year. Please phone Apple Financial directly if you have question about any item on the application form. Note that enrollment contracts and deposits are still due back at school by the required deadline of March 3, 2023.
- New families are eligible to apply on acceptance. Applications for children accepted at mid-year will be considered if funds remain. Admission decisions and Tuition Adjustment decisions are independent of each other.
- **The deadline for applications this year is Tuesday April 11.** Late applications will be reviewed after the process for timely applications has been completed. Any remaining funds will then be awarded to qualified late applicants.
- Tuition adjustment recipients are asked to support the school by committing to a task that will help our outreach or else save the school money. **Tasks include attending our School Gardening and Maintenance days two to three times a year and** supporting our fundraising and outreach efforts.

- The committee cannot become involved in financial arrangements between parents. Non-custodial parents must submit financial documentation.
- Both parents are expected to contribute income if there are no pre-school children at home.
- Families with tuition arrears may apply. However, the school reserves the right to cancel contracts for families whose arrears remain unpaid at the beginning of the school year for which the award was granted.

Procedure

Halton Waldorf School is pleased to work with the following process. This process is streamlined to meet a number of our needs and is designed to be equitable to all applicants.

Online Application Process: applefinancialservices.ca

1. Create a Parent Account Registration or select the “re-applying” button where you will be asked to provide your email address.
2. For new accounts, a verification message stating, “account set up” will be sent to the email address you provide.
3. Once this verification message is received you will be able to open the online registration form
4. At the end of the process, request will appear for the uploading of tax information such as your T4, current year’s pay statements, etc. **If you have difficulty uploading this information you can mark the information “to be mailed in.”
5. Once all your information is uploaded the payment section will appear where you can pay the \$90 application fee by credit card or debit.
6. A financial analysis, followed by a recommendation is sent from Apple Financial to the Administrative Direction, Siobhan Hughes, at Halton Waldorf.
7. The Administrative Director views the recommendations. All details are kept confidential. In consultation with the Board treasurer and the Finance Administrator, the amounts are finalized within the context of the policy and the strategic enrollment plan.
8. The Administrative Director communicates the tuition adjustment amount to the applicant. The deadline for acceptance of the offer is two weeks after notification.

If you would like to access Apple’s Frequently Asked Questions document, you can obtain one once you have logged on to their website [Apple Financial Services Home](http://applefinancialservices.ca)

Tuition Adjustment Approval

The final decision for tuition adjustment is made by the committee taking into account numerous factors including family and school finances. This decision is a combination of objective and subjective factors. The final decision is often a compromise between family needs and available funds being utilized to assist the maximum number of students.

Appeals

If no assistance is granted, or the award you receive is less than you require to enroll, you may write a letter of appeal to the committee. This letter should outline any expenses or financial obligations omitted from your original application. Your original application is carefully reviewed, so the appeal letter should explain why the amount awarded was insufficient. The letter must also include how much more assistance you need in order to make it possible for you to enroll or remain at the school. Success in an appeal depends in part on availability of funds.

For questions regarding tuition adjustment, contact Siobhan Hughes, administrator, at siobhan.hughes@haltonwaldorf.com or 905-331-4387 x11.