



TUITION ADJUSTMENT 2025-2026

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 socio-economic diversity in its community. Approximately 15% of our families receive tuition assistance. The tuition adjustment budget accounts for 10% of the school's net 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 **Apple Financial Services**, a third-party reviewer, to assess tuition adjustment applications. All information is treated with discretion and kept confidential.

Tuition adjustment is determined by considering applicants' income and resources in conjunction with their assets and liabilities. 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. We aim to ensure a Waldorf education for all students, but our ability to do so is limited. Parents are required to 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 board members, the Finance Administrator and the Administrative Director. 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 annual 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 January 24th, 2025, for the 2025/2026 academic year. Please contact Apple Financial if you have



questions about any item on the application form. Note that enrollment contracts and deposits are still due back at school by the required deadline of February 7th, 2025

- New families are eligible to apply on acceptance. Applications for children accepted at mid-year will be considered if funds remain; admission and Tuition Adjustment decisions are independent.
- **The application deadline this year is Monday, April 7th.** Late applications will be reviewed after the timely application process 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 an energy exchange of approximately 40 hours for the school year. Recipients might commit to tasks such as cleaning the grade or high school, tackling specific maintenance projects around the school, writing content for our blog, leading projects in alignment with a particular skill set, and other arrangements that might support the school's outreach or else save the school money. The specific details of a family's energy exchange are agreed upon with the Administrative Director.
- The committee cannot become involved in financial arrangements between parents. Non-custodial parents must submit financial documents.
- Both parents are expected to contribute income if no preschool children are 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. It is streamlined to meet our needs and designed to be equitable to all applicants.

1. Create a Parent Account Registration or select the "re-applying" button. 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 can open the online registration form.
4. At the end of the process, a request will appear to upload tax information such as your T4, current year's pay statements, etc. ***If you have difficulty uploading 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 or debit card.
6. Apple Financial sends the Administrative Director, Cait Mizzi, at Halton Waldorf School a financial analysis followed by a recommendation.



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.

For Apple Financials' **Frequently Asked Questions**, please visit
<https://www.applefinancialservices.ca>

Tuition Adjustment Approval

The committee makes the final decision for tuition adjustment, considering 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 received is less than you require to enroll, you may write a letter of appeal to the committee. This letter should outline any expenses of 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. This letter must also include how much more assistance you need to make it possible for you to enroll or remain at the school. Success in an appeal depends in part on the availability of funds.

For questions regarding tuition adjustment, please contact:

Cait Mizzi, Administrative Director
cait.mizzi@haltonwaldorf.com
(905)331-4387 x11