



## **TUITION ADJUSTMENT PROGRAM 2018-19**

### **Mission Statement**

The Tuition Adjustment Program has been developed to ensure as much as possible that families who are committed to Waldorf education are able to send their children to Sunrise when they are unable to pay full fees according to the published fee schedule. The purpose is to make Waldorf education accessible to as many families as possible, balancing the financial health of the school with the recognition that economic obstacles to the free development of individual ability cause a loss to us all.

### **Mandate**

The Tuition Adjustment Committee has been mandated by the Finance Committee to review and approve applications for tuition adjustment.

### **Committee Membership**

The Tuition Adjustment Committee consists of parents and active members of the community who have been selected for their established commitment to the school and ability to make difficult decisions with clear deliberation and fairness. So that they are not subjected to undue influence by community members, committee membership is kept confidential. The Finance Director provides the tuition adjustment applications to the Committee and provides a link between the applicants and the Committee when additional communication is necessary for the Committee to come to a decision. The Committee takes responsibility for recruiting members as the need arises, subject to the approval of the Head of School.

All information disclosed to the Committee members is held in the strictest confidence according to the school's privacy policies and additional confidentiality requirements placed on the Committee. No information provided to the Committee members may be shared, nor will the fact that the application has been received or considered be disclosed. Committee members are required to excuse themselves from deliberations when an application is being considered for individuals who are closely related (family or friend) to the member.

### **Policy**

Tuition adjustment is available for families with children aged five and older. (Children younger than five qualify for the BC Child Care Subsidy.) All families wishing to be considered for tuition adjustment must complete an application form and provide verification of their income and other documentation, as requested.

The financial information provided on the application form is entered into a formula that has been developed to provide the Committee members with an objective comparison of all applications. This formula considers total annual income, net assets, total tuition and fees of the applicant, etc., to determine the amount of adjustment. However, the Committee members may also consider special circumstances regarding specific family situations that may impact their final award decision. It is recognized that parents (including parents who pay full fees) may have to make monetary and/or lifestyle compromises to enable their children to attend Sunrise Waldorf School. Applicants may be asked to provide further information through the Finance Director, if necessary.

Although the school would like to offer as much support as necessary to allow each student who would like to attend the school to do so regardless of financial limitations, we are not always able to do so due to budgetary limitations. Funding for the Tuition Adjustment Program comes directly from the tuition revenue received from Sunrise parents and grants received from the Provincial government. The ability to offer families an appropriately assessed tuition level is affected by the number of applications received in a given year. Total tuition adjustment is set at 10% of the net tuition income for the school year in which it is awarded with a minimum payment of \$2,935.00 per student expected (although this condition may be waived in extreme circumstances; in all cases, supply fees and activity fees must be paid by the family).

Applications are accepted during the re-registration period and awarded before the contract for the new school year is finalized. Although applications may be made following the re-registration period if a family's financial situation changes due to unforeseen circumstances, the available funds may be limited. We do set aside a portion of the tuition adjustment budget for these special circumstances.

Tuition adjustment awards cannot be made to any family who has a past due or arrears balance owing to Sunrise Waldorf School. A payment plan for paying down any past due balance must first be agreed with the Finance Director prior to a Tuition Adjustment application being reviewed by the Tuition Adjustment Committee. If you are in arrears, please make an appointment with the Finance Director before submitting your Tuition Adjustment application.

Tuition adjustment is awarded for the current year only and is expected to be a temporary measure. Subsequent applications are re-evaluated each year. Parents who sign an agreement for reduced tuition fees are expected to honour that agreement.

### **Sustainable Community**

We are placing trust in applicants that they are including all sources of income, even if unreported or not taxed, and ask that families first consider whether there are other sources of funds that can be pursued to supplement your ability to pay tuition. Each parent's tuition contributes not only to their own child(ren)'s education, but to that of all the other children as well.

## **Parents Who Are Separated or Divorced**

Sunrise Waldorf School policy requires that separated or divorced parents requesting financial aid must BOTH complete Tuition Adjustment application forms to receive adjustment. This includes the custodial parent and non-custodial parent. It is not possible for the Tuition Adjustment Committee to become involved with any financial arrangements between parents. Financial information for both parents must be received.

Sunrise Waldorf School's policy in determining the financial need of students whose parents are separated or divorced is as follows. Remarriage of either parent creates a new family unit with new relationships but we believe that natural (or adoptive) parents still have a responsibility for educational expenses despite any legal agreements to the contrary. Therefore, the income, expenses, assets and liabilities of the entire new family unit are considered in addition to the natural (or adoptive) parent's ability to contribute to the cost of education.

The term **custodial parent** refers to the parent with whom the student resides (or resided with most during the 12 months prior to the date of the application). The other parent is referred to as the **non-custodial parent** even in cases where parents legally share joint custody. Please remember that under joint custody, both parents are liable for the full amount of tuition owed.

The School wishes to minimize any potential problems students might encounter as a result of this policy, so the Tuition Adjustment Committee will gladly consider any special circumstances that might prevent compliance, such as:

1. The location of the non-custodial parent is unknown.
2. The non-custodial parent has had no contact with the family for more than three years.

## **Review Process**

If the applicant is unhappy with a decision of the Committee, they may request a meeting with the Finance Director. The Finance Director shall relay the information received in this meeting to the members of the Tuition Adjustment Committee for further consideration. The Finance Director will discuss the decision with the Committee and return a final decision to the applicant after this review.

## **Release and Storage of Parent Personal Information**

Sunrise Waldorf School acknowledges that there will be no disclosure of personal information to unauthorized personnel or third parties who are not directly involved in the tuition adjustment process unless written authorization from a parent or legal guardian is provided to the school. The school will securely store all digital and hard copy parent and student personal information.

**Kevin McDuff**

Title: **Privacy Officer**

Phone: **250-743-7253**

**Please complete the application included herein and attach a letter stating any special circumstances that should be considered when reviewing your application.**



**Tuition Adjustment Program**  
**Application for the 2018-19 School Year**

**Applicant 1** \_\_\_\_\_

**Occupation** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Applicant 2** \_\_\_\_\_

**Occupation** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

**Child** \_\_\_\_\_ **Birth Date** \_\_\_\_\_ **Class** \_\_\_\_\_

**Child** \_\_\_\_\_ **Birth Date** \_\_\_\_\_ **Class** \_\_\_\_\_

**Child** \_\_\_\_\_ **Birth Date** \_\_\_\_\_ **Class** \_\_\_\_\_

**Child** \_\_\_\_\_ **Birth Date** \_\_\_\_\_ **Class** \_\_\_\_\_

I/we certify that the information provided in this application is true and complete, and I understand that the Tuition Adjustment Committee will rely on this information.

\_\_\_\_\_  
**(Signature of Applicant 1)** **Date** \_\_\_\_\_

\_\_\_\_\_  
**(Signature of Applicant 2)** **Date** \_\_\_\_\_

# Financial Information

Family Name: \_\_\_\_\_

## STATEMENT OF CURRENT FINANCIAL SITUATION

For annual amounts, divide by 12 to enter the monthly income or expense below.

### Income/month

Net salary or wages \_\_\_\_\_

Dividends/interest \_\_\_\_\_

Child Support \_\_\_\_\_

Boarder/ Rental income \_\_\_\_\_

Contract Work \_\_\_\_\_

Social Assistance \_\_\_\_\_

WCB or EI \_\_\_\_\_

If receiving EI benefits,  
please indicate for how long \_\_\_\_\_

Alimony \_\_\_\_\_

Income Tax Refund \_\_\_\_\_

Other Government  
Assistance (e.g. RAP) \_\_\_\_\_

Other Income  
(please specify) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TOTAL** \_\_\_\_\_ (per month)

### Expenses/ month

Mortgage  Rent \_\_\_\_\_

Loan Payments \_\_\_\_\_

Credit Card Payment \_\_\_\_\_

Food \_\_\_\_\_

Tuition – Sunrise W.S. \_\_\_\_\_

Home Insurance \_\_\_\_\_

Phone / Cell / Internet \_\_\_\_\_

Utilities: Hydro/Gas/etc. \_\_\_\_\_

Vehicle Gas/Insurance \_\_\_\_\_

Clothing \_\_\_\_\_

M.S.P. Payment \_\_\_\_\_

Other insurance \_\_\_\_\_

Other Expenses  
(please specify) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TOTAL** \_\_\_\_\_ (per month)

## Financial Information (continued)

**Family Name:** \_\_\_\_\_

### STATEMENT OF ASSETS AND LIABILITIES

**Assets**

Cash/Bank accounts \_\_\_\_\_

Stocks/Bonds/RRSPs \_\_\_\_\_

Life Insurance Policies \_\_\_\_\_

Vehicle(s) \_\_\_\_\_

RV/boats/ATV \_\_\_\_\_

Current value of  
property owned \_\_\_\_\_

Other Assets \_\_\_\_\_

**TOTAL ASSETS** \_\_\_\_\_

**Liabilities**

Mortgage (owing) \_\_\_\_\_

Loans (owing) \_\_\_\_\_

Other notes payable \_\_\_\_\_

Taxes (owing) \_\_\_\_\_

Credit card balances \_\_\_\_\_

Other liabilities  
i.e. Line of Credit \_\_\_\_\_

**TOTAL LIABILITIES** \_\_\_\_\_

### OTHER PERTINENT INFORMATION

Do you receive financial assistance from another source for tuition? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, please specify. \_\_\_\_\_

\_\_\_\_\_

If no, do you know of anyone who may be interested in sponsoring your child(ren)?

(provide name, address, phone number)

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

## ATTACHMENTS

**Please provide a separate cover letter explaining why you are requesting Tuition Adjustment for the 2018-19 school year. Please include an explanation of any unusual circumstances which may not be evident from your financial data and any other relevant information you wish the Tuition Adjustment Committee to consider.**

**If any information we have requested is unavailable, please include the reasons in your cover letter.**

**Please also provide photocopies of the following supporting documentation and mark the checkbox for each document being provided.**

- |  |  |
|--|--|
| <input type="checkbox"/> Your most recent Notice of Assessment and/or Tax Returns (if your employment status has changed since the most recent documentation, please describe) | <input type="checkbox"/> Mortgage/lease contracts  |
| <input type="checkbox"/> Child Tax Credits   | <input type="checkbox"/> Boarder or Rental Income  |
| <input type="checkbox"/> GST Refunds   | <input type="checkbox"/> Bank Statements – chequing, savings (last 3 months)   |
| <input type="checkbox"/> BC Low Income Climate Action Tax Credit   | <input type="checkbox"/> Most recent Property Assessment or proof of home purchase price if bought within the last 5 years     |
| <input type="checkbox"/> Universal Child Care benefits   | <input type="checkbox"/> Any other debt outstanding  |
| <input type="checkbox"/> Copies of the two most recent pay stubs for each parent   | <input type="checkbox"/> If you own your own business, financial statements, tax returns and bank statements for your business |

You need to submit only those pages of the documentation listed above that shows the pertinent information needed to assess your financial status. If you are unable to submit an applicable document, please include an explanation why the document is unavailable. We will not consider the application incomplete if an explanation for missing supporting documentation is included. We are just looking for an honest picture of your family's financial situation so that equitable awards can be determined.

**Please be aware that any application submitted that includes information that is shown to be intentionally incomplete or inaccurate will be denied.**

### **Release and Storage of Parent Personal Information:**

Sunrise Waldorf School acknowledges that there will be no disclosure of personal information to unauthorized personnel or third parties who are not directly involved in school management or the care, supervision and instruction of your child(ren) at this school, unless written authorization from a parent or legal guardian is provided to the school. The school will securely store all digital and hard copy parent and student personal information.

**Kevin Mc Duff**

Title: **Privacy Officer**

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