Marin Montessori School

Tuition Assistance Policy Manual

Fall 2018

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**Introduction**

Marin Montessori School finds great value in making our processes as clear and transparent as possible, and has developed this manual for that purpose. This manual should answer most, if not all, of your questions relating to the Tuition Assistance processes.

**PRINCIPLES OF GOOD PRACTICE FOR FINANCIAL AID ADMINISTRATION**

Marin Montessori School follows the “Principles of Good Practice for Financial Aid Administration, as published by the School and Student Services, a subsidiary of NAIS.

Marin Montessori School:

1. Adheres to all applicable local, state, and federal laws and regulations, including those that require non-discriminatory practice in administering its financial aid policies.

2. Operates within the context of both short- and long-range financial aid budget and policy goals.

3. Uses objective research to measure the effectiveness of its progress toward its goals, and communicates the outcomes to its constituents, as appropriate.

4. Provides clear and transparent information to families through outreach, education, and guidance on all aspects of its financial aid process and the factors that influence admission and aid eligibility.

5. Determines eligibility for admission without regard to a student’s application for financial aid.

6. Commits to providing financial aid dollars to applicants who demonstrate that their family resources are insufficient to meet all or part of the total educational costs.

7. Continues to provide support to students as long as they demonstrate financial need.

8. Maintains the same standards of behavior and academic performance for recipients of financial aid as it does for non-recipients.

9. Enacts documented procedures that ensure a fair, consistent, and equitable assessment of each family’s ability to contribute toward educational expenses.

10. Makes and communicates financial aid decisions in a manner that allows families to make timely, careful, and fully-informed enrollment decisions.

11. Establishes administrative and accounting procedures that distinguish the school’s need-based financial aid program from tuition assistance programs that are not based on financial need.

12. Safeguards the confidentiality of financial aid applications, records, and decisions while respecting the right of each family to discuss its own financial aid outcomes in an appropriate manner.

13. Supports collaboration between the financial aid office and other offices within the school.

14. Supports collegial relationships with other schools and organizations for professional development, exchange of best practices, and other information sharing, as appropriate.

**Marin Montessori School Mission Statement**

To nurture the development of each student in the community to his or her potential - an independent, responsible, compassionate, learned individual who thinks critically and realizes clearly his or her role in the world. MMS's mission is to provide education for life.

**Who can apply?**

Any parent is free to apply for tuition assistance, no questions asked. The question is often asked of the Director of Finance “Will I qualify for assistance?” or “How much assistance will I qualify for?”

The Director of Finance will not answer these questions as there are so many variables to consider before an EFC (Expected Family Contribution) is calculated. Instead, the Director of Finance will direct families to the application process.

For families that have two households (divorce situations), both parents need to submit an application.

**Types of Tuition Assistance offered**

Marin Montessori School offers two types of Tuition Assistance:

1. Tuition Assistance. Any family in the school can apply for this program. The school uses SSS (School and Student Services, a division of NAIS) as the software that calculates Expected Family Contribution (EFC) amounts. All awards in this program are need-based. The EFC dollar value is used as the basis for all awards.
2. Tuition Remission. Tuition Remission is available to children of MMS full-time faculty and administrative staff. Assistants and Support staff are entitled to this benefit after one year of employment. Please refer to the Employee Handbook if you are an employee.

**What does Tuition Assistance cover?**

Tuition Assistance can cover, although not all families will receive all forms of aid:

1. A portion of tuition
2. An award toward after school care
3. An allowance for multi-day class trips

**How is the Tuition Assistance budget determined?**

The Tuition Assistance budget is a factor of overall tuition revenue. The Marin Montessori School Board of Trustees sets a target percentage, which is used to build the school’s overall operating budget. This percentage is currently 15% of gross tuition.

**Marin Montessori School Tuition Assistance Policy**

It is the policy of MMS to provide Tuition Assistance, within the School's financial capability, to families experiencing hardship in paying the full tuition cost. We particularly seek to fulfill our mission of “nurturing the development of each child in our diverse community” by offering assistance to families from varied backgrounds. The total amount available for this purpose will be determined by the Board of Trustees for each school year. The allocation of this total amount will be determined by the Tuition Assistance Committee. The Tuition Assistance Committee's decisions on allocations will be final, and all information concerning applications and the deliberations of the Committee shall be confidential, restricted to the Committee members.

1. All families will be expected to pay a minimum tuition amount of $300 per month.
2. In considering applications, the Tuition Assistance Committee shall give priority to the families of currently enrolled students.
3. Children at the Toddler level do not qualify for Tuition Assistance.
4. Tuition assistance shall be granted for one year. Applicants may re-apply for successive years. Such applications will be evaluated based on their then current situation.
5. The Committee shall have the authority to make exceptions to the established guidelines in extraordinary situations.
6. An applicant who receives Tuition Assistance must keep tuition payments current. If a payment is more than 30 days late, Tuition Assistance may be revoked.
7. Applications must be submitted through the online Tuition Assistance service. Paper applications are no longer allowed.
8. A student receiving Tuition Assistance is eligible for assistance for school-sponsored overnight trips. Funds are extremely limited for this program.
9. Awards are based in part on the EFC (Expected Family Contribution) as calculated by SSS (School and Student Services). This dollar amount is what the software calculates as the family’s ability to pay for tuition.
10. All families receiving awards must submit their prior years’ Federal income tax returns by April 15 of the following year. Awards are considered “provisional” until tax returns have been submitted and verified.
11. Families must also complete IRS Form 4506, which allows MMS to obtain a copy of their tax return directly from the IRS. Families will be billed $75.00 if the school needs to obtain a tax return for a family.

**Roles and Responsibilities of the Tuition Assistance Committee**

The Tuition Assistance Committee is a confidential committee, meaning the members are unknown to the general public. However, there are two key members:

1. Director of Finance (DoF). The DoF is the “face” of the Tuition Assistance Committee. The DoF acts as the School’s representative for any questions, concerns, etc. of families applying for assistance. The DoF will be expected to have a full and complete understanding of the school’s tuition assistance policies, as well as the software used to calculate Tuition Assistance awards. The DoF should have the ability to guide and counsel families considering applying for Tuition Assistance, as well as for families that do not qualify. The DoF will make a presentation to the Committee with suggested award amounts upon which the committee will decide.
2. Head of School. The Head of School also sits on the Tuition Assistance Committee and has ultimate say in a complicated award decision.
3. Further members are included as requested by the Head of School.
4. No board members or parents of current students sit on the committee.

**Financial Aid Application Requirements – Returning Applicants**

Every family applying for assistance must submit an application for each year. The general timeline is as follows:

 November Open application season

 December Committee reviews applications and makes decisions

 January Tuition Assistance awards are included in Re-Enrollment Agreements

 February Agreements are returned with signatures noting acceptance

Applications include:

Submitting a PFS (Personal Family Statement) on the SSS website

Submitting a Form T4506, which allows the school to contact the IRS and have a copy of the official tax return sent to the school

Submitting the current year’s complete tax return by April 15 of the following year

Applications also may include:

 Questions from the DoF, or from the Committee, requesting further information

 A copy of the family’s current bank statements

 A copy of the parent’s current wage stub

 A copy of an award letter for a sibling at a different school

 A family budget showing income and expenses and the capacity to pay for any unfunded tuition

**Financial Aid Application Requirements – New Applicants**

Families new to the school must follow the same process as returning families, just on a different time line:

 November - January Open application season

 February Committee reviews applications and makes decisions

 March Tuition Assistance awards are included in Enrollment Agreements

 March Agreements are returned with signatures noting acceptance

Applications include:

Submitting a PFS (Personal Family Statement) on the SSS website

Submitting a Form T4506, which allows the school to contact the IRS and have a copy of the official tax return sent to the school

Submitting the previous two (2) years complete tax returns

Submitting the current year’s tax return by April 15 of the following year

Applications also may include:

 Questions from the DoF, or from the Committee, requesting further information

 A copy of the family current bank statements

 A copy of the parent’s current wage stub

 A copy of an award letter for a sibling at a different school

 A family budget showing income and expenses and the capacity to pay for any unfunded tuition

**Confidentiality**

Marin Montessori School will treat all financial aid information provided by families with the strictest of confidentiality. Additionally, any awards granted by the Tuition Assistance Committee will never be shared with anyone outside or inside of the School community – whether to other faculty, staff, families or community members. Tuition Assistance information will be reviewed only by those persons directly involved in the decision-making process or in its administration. Tuition Assistance Committee members are expected to respect the sensitivity of the information provided by applicants, and must not discuss such information outside of Committee meetings.

**Security on-line and at the School**

Both SSS (School and Student Services, a division of NAIS) and Marin Montessori School strive to provide the highest security for your sensitive data as is possible. Because of this:

1. Do not share your SSS log in or password with anyone outside of your family
2. The school does not allow tax returns to be submitted to us; they must be directly uploaded to the SSS website.

**Decision Appeal Process**

On occasion, parents are not comfortable with the award which they have been offered. The Decision Appeal Process is as follows:

1. Email your concerns to the Director of Finance. Lay out clearly what the problems or obstacles are.
2. The DoF will then contact you for further information and to discuss the situation.
3. The DoF will then call a meeting of the Tuition Assistance Committee for review of the decision.

There is no promise, implied or not, that an appeal will be honored.

**Additional Tuition Assistance Policies - Professional Judgment Settings**

The SSS software has the ability to customize calculations based on the school’s criteria of certain factors. Marin Montessori School applies Professional Judgment Settings to the following calculations - Regional Cost of Living Index. This calculation adjusts the San Francisco Bay Area as a higher cost area to live in, thus reducing the EFC.