



The Tuition Assistance Committee (TAC) services the Honolulu Waldorf School community by attempting to close the gap between the set tuition and a family's ability to pay. Most families use several strategies to keep the costs within reach, and it is important to note that the family bears the primary responsibility for financing a child's education to the extent that it is able. The TAC is responsible for granting tuition assistance based on demonstrated financial need in accordance with the TAC's budget, procedures, and policies. The tuition assistance helps to support the economic diversity of the community and economic health of the school. Numerous other factors are also considered - family size, assets, debt, number of children in tuition-charging schools or colleges, as well as care responsibility for an elderly parent. The TAC also differentiates between necessary expenses and money spent for lifestyle choices. The school does not provide tuition assistance to make up for lifestyle expenditures that could have been directed to education. All students regardless of age or grade are eligible to apply.

**When do I need to apply?** For new students, the deadline is 30 days after acceptance. For current students, the deadline for priority consideration is March 7. However, our tuition assistance process is year-round. You can apply anytime during the year, subject to the fund availability.

**How do I apply?**

- Go to <https://online.factsmgt.com/signin/4BQWR> to access the FACTS Tuition Aid website for the Honolulu Waldorf School. Click on "Applicant Sign In". Go to "New Users" and set up an account. The Tuition Assistance Application is done on-line. If you do not have internet access, please contact the Business Manager, Irene Knuuti (808) 792-5042 or email: [iknuuti@honoluluwaldorf.org](mailto:iknuuti@honoluluwaldorf.org)
- All supporting documents must be forwarded to Facts Tuition Aid. You can choose to mail or fax supporting documents or even upload all supporting documents to your on-line application. You must fill in "Ability to pay" or the application will not be considered completed. It takes approximately 10 business days to have your application verified by FACTS; please plan accordingly.
- For families who meet the March 7 priority consideration deadline with completed and verified applications, TAC will review and contact you by March 20. All other completed applications will be reviewed within 3 weeks from the submission date of a completed application.
- It is very important to revisit the FACTS Tuition Aid website to make sure your application has been completed. The TAC will not consider an incomplete application.

**Documents needed:**

- Most recent Form 1040, W2, 1099, and all applicable schedules.
- Most recent G49 for self-employed applicants.
- Additional documents may be requested as needed.

**What does it cost to apply for financial aid?** FACTS Tuition Grant & Aid charges a \$35.00 fee, subject to change, for processing your application.

**What does tuition assistance cover?** Tuition assistance covers a portion of the tuition only. All other fees and incidental expenses are excluded.

**What if I do not file an IRS 1040?** You are required to complete a Form 1040 and submit it to FACTS even if you do not submit it to the IRS.

**Can a family request for reconsideration if the award granted is insufficient?** Yes. Applicants have 2 weeks from the date of the award notification to make the request. The request must be in writing (letter) and must include objective financial proof of additional need or any additional information not included in the original application.

**What if my financial situation has changed significantly since last tax return?** Attach a letter with supporting documents (examples are last two months' paystubs, unemployment compensation, doctor certification, etc...) when submitting the original application.

**What if my child only attends school part-time in the Early Childhood Program?** You are still eligible to apply for tuition assistance, but the award will be pro-rated based on the tuition amount. Since FACTS's Tuition Aid on-line application does not include a field for a part-time program, please write a memo and upload it to FACTS to state your child will attend a part-time program.

**How does this process work for divorced, separated, single or remarried parents?** We believe that the financial responsibility for a student's educational expenses rests with the student's biological parents, regardless of marital status or living situation. If either parent has remarried, the analysis considers the assets and earnings potential of the stepparent as well. If either parent lives in a household with another adult, we may consider the assets and income of that person, depending on circumstances. In view of this, both natural parents and their current spouses need to fill out a separate application

Divorced parents must provide a court-ordered document that specifies the financial responsibility regarding educational expenses. If there is no specification, a non-custodial parent must provide financial information.

**Are there exceptions to the above policy?** Requests for consideration of extenuating circumstances should be explained in a letter addressed to the TAC. The TAC may ask for documents from an official source, such as a family doctor, attorney, social worker, employer, etc. which explain the location, involvement, and current situation of the non-custodial parent.

**How are tuition assistance awards determined?** Awards are based on a formula applied to family's needs as indicated by FACTS, as well as on the special circumstances described by the family. The school expects every parent to contribute to the financial support of their children's education.

Factors considered include family size, assets, debt, number of children in tuition-charging schools or colleges, as well as care responsibility for an elderly parent. The TAC also differentiates between necessary expenses and money spent for lifestyle choices. The school does not provide tuition assistance to make up for lifestyle expenditures that could have been directed to education. When the TAC finds that a family's financial position demonstrates a need for assistance, it then determines the appropriate tuition assistance grant based on its budget and the number of applicants.

**Do I need to re-apply for financial aid each year?** Yes

**Do I need to make a new account tuition assistance account each year:** Yes

### **How do I contact FACTS Tuition Grant & Aid?**

Customer Care Reps are available:

Monday through Thursday from 7 a.m. to 7 p.m. Central Time

Fridays 7 a.m. to 5 p.m. Central Time.

Office Number: 866-441-4637 (ext. #2) • Fax Number: 866-315-9264

Mailing Address:

FACTS Grant & Aid Assessment

P.O. Box 82524

Lincoln, NE 68501-2524

FACTS Tuition Aid Application Link: <https://online.factsmgmt.com/signin/4BQWR>

FACTS Customer Service: <https://online.factsmgmt.com/public/inst/4BQWR/N/Y/customer-service>

### **What if I have additional questions?**

Please call or email the Honolulu Waldorf School business office.

Irene Knuuti: Tel: (808) 792-5042

Email: [iknuuti@honoluluwaldorf.org](mailto:iknuuti@honoluluwaldorf.org)