

## **IMPORTANT DATES**

### **Current Families**

November 10, 2011	Indexed Tuition Packets available
December 31, 2011	TADS application deadline
February 1, 2012	Re-Enrollment Contracts issued
March 1, 2012	Re-Enrollment Contracts returned

### **New Families**

November 10, 2011	Indexed Tuition Packets available
February 1, 2012	Admission applications due
February 1, 2012	TADS application deadline
March 5 2012	Admission Decisions Mailed
April 1, 2012	New Family contracts due

### **CONTACT INFORMATION**

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Director of Admission  
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**TADS website**                      [www.tads.com](http://www.tads.com)

**Blue Oak School TADS ID 05527**



## **INDEXED TUITION 2012-2013**

**BLUE OAK SCHOOL  
1436 Polk Street  
Napa, CA 94559**

## **BLUE OAK SCHOOL INDEXED TUITION**

### **2012 – 2013 SCHOOL YEAR**

As a parent, choosing the right school for your child is one of the most important decisions you can make. If you're like most parents, you are looking for a school that shares your values and offers individual attention, small class size, excellent teachers, and has high academic standards. But perhaps even more importantly, you are searching for a school that is going to provide a high quality, well-rounded experience for your child – a school that offers opportunities not only in the core academic areas, but also in fine arts, music and foreign languages – a school that helps instill good work habits and qualities of personal responsibility and good citizenship. A school like Blue Oak.

Blue Oak School is the first K-8 non-denominational independent school in the Napa Valley. Founded in 2002, the School now enrolls more than 165 students from communities throughout the Napa Valley and the greater North Bay Area.

Just as choosing a school is one of the most important decisions you will make, Blue Oak School believes that a family's investment in their child's future is one of the best investments a family can make. This is particularly true of the investment one makes in an independent school education.

### **Does Indexed Tuition continue throughout a student's time at Blue Oak School?**

Each student's financial need is calculated annually, therefore families are required to complete and submit the Indexed Tuition packet along with all required financial information for each year that they wish to be considered for an indexed tuition rate. Assuming family circumstances remain the same and the school's resources can continue to support indexed tuition to the same extent as in subsequent years, families should expect to pay a similar indexed tuition throughout their Blue Oak School career. If there are significant changes in a family's financial picture, the indexed tuition rate may change.

### **How do I learn more about Indexed Tuition?**

We encourage all families who would like to explore Indexed Tuition to have a confidential conversation with Barb Lundberg, Director of Admission. To schedule a time to discuss Indexed Tuition, please call Barb at 707-261-4522 or connect with her via email ([blundberg@blueoakschool.org](mailto:blundberg@blueoakschool.org)).

Families may request an Indexed Tuition Packet that includes the TADs worksheet, directions on how to submit the TADS online application, and a checklist for the process by calling Andrea Biocca at 707-261-4500.

## Frequently Asked Questions

### **Will submitting the Indexed Tuition Packet hurt my child's likelihood of being accepted?**

Determination of tuition levels is a separate function from the admission process and will not affect a child's likelihood of being accepted at Blue Oak.

### **Does every Blue Oak School family need to submit an Indexed Tuition Packet?**

All families who believe that they will need financial assistance in order to send their children to Blue Oak are encouraged to submit an Indexed Tuition packet and the accompanying financial information to determine the tuition level for which they are eligible. For families who elect not to submit an Indexed Tuition Packet, tuition will automatically be set at the amount of the annual tuition as determined by the Board of Trustees.

### **Is Indexed Tuition available for all eligible students?**

Not all eligible families will receive an indexed tuition. Priority consideration is given to current students and then to eligible new students. In any given year, the number of students who are eligible may exceed the number of students who can be assisted through the School's indexed tuition budget.

### **When will we find out the tuition level for our child(ren)?**

For currently enrolled students, tuition levels will be indicated on the student's re-enrollment contracts which are mailed in February. For newly accepted students, tuition levels will be indicated on the enrollment contracts enclosed with the admission decision letter.

Current Blue Oak School families must complete and submit the TADS Online Application along with the supporting documents by December 31, 2011. Applicant families must complete and submit the TADS Online Application along with all the supporting documents by February 1, 2012.

Over the past ten years, families have invested in a Blue Oak School education because they know that Blue Oak School:

- Provides a challenging academic program
- Fosters confidence and develops character
- Nurtures intellectual curiosity
- Stimulates creativity through an integrated curriculum
- Develops critical-thinking skills
- Promotes time management, study skills and habits of mind that endure
- Instills accountability and responsibility
- Prepares students for higher educational challenges

While Blue Oak believes the primary responsibility for educating a child falls to the parents, we also recognize that for some families, the cost of an independent school education seems out of reach.

Since its founding, Blue Oak has been committed to making a Blue Oak education more accessible and affordable. We realize that each family presents a unique financial picture, and as a result, we do not expect each family to pay the same amount of tuition.

In 2011, in an effort to help families realize that a Blue Oak School education can be affordable, Blue Oak moved from a program traditionally known as "financial aid" to a program called "Indexed Tuition".

## What is Indexed Tuition?

Indexed Tuition allows Blue Oak School to offer a range of tuitions to support the economic diversity that is such an important component of our school community. Our sliding scale tuition is strictly need-based and recognizes that each family's financial situation is unique.

### Should my Family consider Indexed Tuition?

Blue Oak School encourages families who have concerns about their ability to afford the full cost of a Blue Oak education to request an Indexed Tuition Packet. Each family's financial situation is considered thoroughly and confidentially on an individual basis to insure attention to special circumstances.

It is impossible for the School, or for a family, to determine the exact level of tuition unless the entire packet is completed. Indexed Tuition forms will be available November 1, 2011 and should be submitted no later than December 31, 2011 for returning families and February 1, 2012 for families applying for admission for the fall of 2012. Families should note that the timeframe for determination of indexed tuition moves quickly. Failure to meet deadlines may prevent the School from determining an indexed tuition rate, or may significantly affect the tuition amount assigned to the family.

### What are the major components that define the Indexed Tuition Range?

Like most independent schools, Blue Oak School uses an outside service to evaluate a family's ability to pay tuition. The Tuition Aid Data Services (TADS) provides both families and the School with a high level of confidentiality, expertise, impartiality and accuracy. The formula that TADS uses to calculate a family's contribution towards education is complex and considers many factors that affect a family's ability to pay tuition. Among the factors considered are:

**Income:** Income refers to pre-tax income from wages, business or investments. The formula considers certain costs against this income in calculating a family's ability to pay. If two parents reside in separate households, the income and expenses of both households are considered in the equation.

**Assets:** If a family has major assets, savings and/or investments, the formula will compute an income supplement that will be added to the calculated gross income. The treatment of home equity is not matched to the actual market value in the North Bay Area, but calculates a value based on the price paid for the home and the years it has been owned.

**Family Size:** Living-allowance estimates take into account the number of people in the household(s), and base estimated necessary expenditures for housing, food, medical needs, etc., on this number. Income is adjusted by these expenses to calculate the available discretionary income.

**Unusual Expenses:** The formula for determining the family contribution for educational expenditures takes into account certain unusual expenses such as alimony and child support, the care of an aging grandparent, and student loan debt.

**Dependents enrolled in tuition-charging schools:** The ability to pay is divided by the number of tuition-paying family members at any elementary school, high school or college (including adult students) to determine the indexed tuition rate for any one student.

**Divorced, Separated or never married parents:** Indexed Tuition is based on the family's ability to pay as demonstrated by the information submitted to TADS. *Both custodial and non-custodial parents (regardless of legal settlements) who are divorced, separated or never married are expected to contribute to educational costs and are required to submit an application for Indexed Tuition.* In exceptional cases where one parent cannot comply, the custodial parent should submit a written explanation. Lack of information from either parent may prevent determination of Indexed Tuition or significantly affect the tuition amount.