

February 1, 2012

Dear San Francisco School Parents and Guardians,

Enclosed is your 2012-2013 re-enrollment package, some highlighted dates for the 2012-2013 school year calendar and the 2012 summer brochure. This year, in an effort to create more clarity, we are introducing an expanded re-enrollment form. Please read these documents carefully.

It is the school's highest priority to assure that each student is able to re-enroll next year. Therefore, if you have any unusual circumstances to discuss regarding your child(ren)'s re-enrollment, please contact Head of School, Steve Morris ([smorris@sfschool.org](mailto:smorris@sfschool.org)) or Admissions Co-Directors, Nina Wang and Paloma Herman ([admissions@sfschool.org](mailto:admissions@sfschool.org)) immediately. The Admissions Office operates under a tight schedule to fill any open spaces, so it is very important that **we receive a signed re-enrollment form and enrollment deposit for each returning student no later than 5:00 pm Wednesday, February 15, 2012**. If we do not receive your enrollment form by that time, we cannot guarantee a space for your child(ren). The non-refundable deposit amount this year is \$2,200 which will be credited to your child's 2012-13 tuition. The deposit amount for students on indexed tuition is 10% of their 2011-12 tuition.

Please note that the cost of providing a student's education is fixed at the time we enroll each class. The cost is not reduced by a student's failure to attend school. Since the School's admissions process is very selective, we only have a short window in which we can find the most qualified candidates for each class. It is often very difficult, if not impossible, to fill vacancies with qualified students after the admissions process ends. Therefore, each family that signs an enrollment contract commits to paying a full year's tuition for their student(s).

As with last year, this was another challenging year for the Finance Committee to craft a budget that was both sensitive to the impact of the current economy and at the same time stays on course with the goals set forth in the Strategic Plan. The January 25, 2012 feature article in the *Tuesday Note Home* highlighted the 2012-13 budget process and priorities for next year. To recap from that article, budget highlights include:

- A tuition increase of 4.99% across all grade levels.
- A strong Indexed Tuition program that remains at 18% of tuition income.
- Funding for Strategic Initiatives that includes additional staff in the Learning Services and Business Office.
- An allocation to the Head's Initiative Fund, which allows for program enhancements to be determined in collaboration with the administration and faculty input.

Indexed Tuition applications were due to be mailed to the SSS on Wednesday, February 1<sup>st</sup>. Applications can be downloaded from the School website at

[www.sfschool.org/admissions/index\\_tuition](http://www.sfschool.org/admissions/index_tuition). If you did not meet the deadline, please contact me right away.

**Important Note:** To align our payment schedule more closely with our budgeting process and with the payment schedules at other schools, over the next two years we will begin the payment process earlier in the year. We are announcing this change well in advance of its implementation and phasing it in over two years to reduce its impact on families.

**Payment Schedule Changes:**

<u>School Year</u>	<u>Monthly and Quarterly Pay Plan</u>	<u>Single Pay Plan</u>
	<u>First Payment Due</u>	<u>Payment Due</u>
<u>2013-2014</u>	<u>June 2013</u>	<u>June 2013</u>
<u>2014-2015</u>	<u>May 2014</u>	<u>May 2014</u>

If you have any questions or concerns, please call (415-239-1410) or e-mail the Business Office ([business@sfschool.org](mailto:business@sfschool.org)).

Sincerely,

Cindy Woo  
Director of Finance and Operations

## 2012-2013 Enrollment Agreement

This Enrollment Agreement (the "Agreement") is made and entered into by The San Francisco School, a California non-profit corporation (the "School"), and the undersigned, for the purpose of enrolling **(Student First Name)** \_\_\_\_\_ **(Student Last Name)** \_\_\_\_\_ (the "Student") into **Grade** \_\_\_\_\_ under the terms and conditions contained in this Agreement.

**1. NON-REFUNDABLE RESERVATION DEPOSIT AND NON-REFUNDABLE ENROLLMENT DEPOSIT:** Concurrently with the return of this Agreement, the undersigned shall pay to the School a **NON-REFUNDABLE Reservation Deposit in the amount of \$2,200 (or 10% of current year tuition if on Indexed Tuition (as defined in Section 5))**. Families shall also pay to the School a **NON-REFUNDABLE Enrollment Deposit of \$1,100 for a new student**. The School must receive a fully-executed Enrollment Agreement and the Reservation Deposit (and if applicable the Enrollment Deposit (collectively, the "deposits")) on or before February 15, 2012 for returning Students and on or before the date set forth in the Student's acceptance letter for new Students.

**2. ACCEPTANCE OF ENROLLMENT AGREEMENT:** The School will accept an Enrollment Agreement for the Student only if tuition and fees (including all deposits) for the current and prior years are paid in full. If a student's account has a past-due balance, the School will apply any funds received to that balance automatically. The School will not re-enroll a student, or admit a student to a School sponsored summer program or any other School program, until his or her account is current and all payments required by this Agreement are current.

**3. TUITION, FEES AND OTHER CHARGES:** Pre-School and Elementary School (i.e., Pre-School through 5<sup>th</sup> Grade) tuition for the academic year is set forth in the attached Addendum ("PS/ES Tuition"). Middle School (6<sup>th</sup> through 8<sup>th</sup> Grade) tuition for the academic year is set forth in the attached Addendum ("MS Tuition" and collectively with ES Tuition "Tuition"). The School offers three convenient payment options, please select one by checking the appropriate box below. If no box is selected, the Single Payment Plan shall apply.

### TUITION PAYMENT PLANS:

SINGLE PAYMENT PLAN: 100% of Tuition is due on or before August 5, 2012.

FOUR PAYMENT PLAN: 25% of Tuition is due on or before each of July 5, 2012, September 5, 2012, November 5, 2012 and January 5, 2012. This plan includes a billing fee of \$55 but no finance charge.

TEN PAYMENT PLAN: 10% of Tuition is due monthly, on or before the 5<sup>th</sup> of each month, starting July 5, 2012 and ending April 5, 2012. This plan includes a billing fee of \$165 but no finance charge.

(a) All balances not paid by the 5<sup>th</sup> day of the month will incur a non-negotiable late fee of \$40, which shall be due and payable upon assessment.

(b) All tuition, fees (including all deposits) and other charges outstanding must be current for the Student to attend classes. The School reserves the right to send the Student home until his or her account is current.

(c) The School's acceptance of any overdue payment that omits late fees or finance charges does not waive the School's right to later assess or collect such fees or charges.

(d) The School may elect at its sole discretion to delay progress reports, transcripts, grades or diplomas for students with outstanding account balances.

(e) Selection of your payment option should also be made on the enclosed Tuition Management Systems ("TMS") Tuition Payment Options Form. For further information on payments via TMS see the Addendum.

(f) Tuition includes the cost of all official School overnight trips. Tuition does not include the costs for any Extended Day Programs or After-School Events (as further described in the attached Addendum).

**4. UNCONDITIONAL OBLIGATION:** The undersigned understand(s) and agree(s) that the cost of providing an education is not affected by the failure of the Student to attend School. The undersigned agrees that the obligation to pay all tuition, fees (including all deposits) and other charges for the full academic year is unconditional, unless the Head of School, on or before **March 19, 2012**, receives written notification of withdrawal of the Student from the School. In such case, any tuition paid, minus the Reservation Deposit and, if applicable, the Enrollment Deposit, will be refunded. All deposits are non-refundable. The undersigned further agrees that, after **March 19, 2012**, no portion of such tuition, fees (including all deposits) and charges, whether paid or outstanding, will be refunded or waived should the Student withdraw, be absent, or be dismissed. Should the School engage counsel or other assistance to obtain payment for the Student's account, the undersigned agrees to reimburse the School for the costs related to such collection efforts.

**5. INDEXED TUITION:** To assure economic diversity and access to the School, not every student is charged full Tuition. Families who apply and qualify for reduced tuition, may be granted an "Indexed Tuition" from the School. For a further description of Indexed Tuition see the attached Addendum. Indexed Tuition awards often occur after enrollment agreements must be executed. If the Student is awarded Indexed Tuition for the current year by the School, before or after the execution of this Agreement, the Indexed Tuition amount set forth in the award letter shall be deemed to be "Tuition" for purposes of this Agreement and any adjusted Reservation Amount set forth in the award letter shall be deemed to the Reservation Amount for purposed of this Agreement.

**6. LEAVES OF ABSENCE:** Other than the partial Tuition offered for a Temporary Leave of Absence described in the attached Addendum, the School does not offer tuition reductions for leave of absence of any length whether for a partial year or multiple years.

### 7. GENERAL CONDITIONS:

(a) The person(s) signing this Agreement on the Student's behalf is (are) liable for the total Tuition, fees (including all deposits) and other charges due hereunder. The Agreement must be signed by all parents, legal guardian(s), or any other adult person who, by signing this Agreement, represents that he or she is legally and financially responsible for the Student.

- (b) The Student and the undersigned agree to accept and abide by the School’s determination of grades and academic standards, and to accept and abide by the rules and regulations as specified in the School’s Student Handbook and other policies (as they may be revised from time to time) and the School’s enforcement thereof. Students and their families are responsible for honoring the School’s rules and regulations at all times.
- (c) The Student Roster and any other personal and private information about students and families are confidential and restricted for School use only. Any inappropriate use of confidential School information may result in appropriate disciplinary action.
- (d) The School believes that a positive and constructive working relationship between the School, its students and their families is essential to the fulfillment of the School’s Mission. Accordingly, the School reserves the right to suspend or dismiss any student if the School concludes, in its sole discretion, that the student’s progress, conduct, or influence are not in keeping with the School’s standards. Further, the School reserves the right to terminate the enrollment of a student, or to decline to offer re-enrollment to a student, if the School, in its sole discretion, decides that the actions or inactions of a student’s parent(s) (or guardian(s)) prevent a positive working relationship or interfere with the accomplishment of the School’s Mission.
- (e) The undersigned on the Student’s behalf acknowledge(s) that personally identifiable information about the Student that is contained in the School’s education records (which, by way of example only, include information about the Student’s grades and any learning differences and/or physical/mental conditions, limitations or treatments disclosed to the School) may be shared among School officials, including teachers, administrators and staff, for Legitimate Educational Interests. “Legitimate Educational Interests” refers to the performance of (i) tasks relating to the discipline of students, (ii) a service or benefit relating to a student or a student’s family (such as counseling or tutoring or Indexed Tuition) and (iii) a task related to the safety and security of the School’s campus or community.
- (f) The undersigned provide permission for the Student to consult, receive and participate in the School’s counseling services, which are provided by a trained mental health professional. Such services are confidential between the counselor and the Student, except in situations involving child or elder abuse, or if it is determined that the Student is a danger to himself/herself or others. (The law requires that evidence of abuse and danger to others must be reported to the proper mandate authorities. When there is a reasonable concern of danger to self, the counselor will use clinical discretion about how to ensure a student’s safety.)

**8. ARBITRATION:**

- (a) The undersigned understand that any legal and actionable controversy or claim arising out of or relating to this Agreement (including, but not limited to, the determination of the scope and applicability of this Agreement to arbitration), the Student’s enrollment in or departure from the School or the Student’s educational experience at the School (including, but not limited to, academic matters, extracurricular activities, community service and other School-related activities, and use of the School’s networks, equipment, campus and other property) shall be submitted to final and binding arbitration to be held in San Francisco, California, before a single neutral arbitrator in accordance with Judicial Arbitration and Mediation Services, Inc.’s (JAMS) Comprehensive Arbitration Rules and Procedures.
- (b) Each party to the arbitration shall pay its pro-rata share of JAMS fees and expenses, except when un-waivable claims based on or tethered to state or federal statutes are raised. If un-waivable claims based on or tethered to state or federal statutes are raised, the School will pay the costs unique to arbitration that the Student and the undersigned would not have incurred if they had pursued such claims in a court of law.
- (c) Discovery will be conducted according to JAMS’ Comprehensive Arbitration Rules and Procedures.
- (d) In the event of any arbitration or litigation between the parties arising out of this Agreement, or which relates in any way to the enrollment of the Student at the School, the prevailing party therein shall be allowed all reasonable attorney’s fees, reasonable expert witness fees and costs expended or incurred in such arbitration or litigation, to be recovered as part of the costs therein, unless prohibited by law.
- (e) The arbitration provisions of this Section 9 apply during the term of this Agreement and after its termination for any reason.

**9. APPLICABLE LAW:** This Agreement shall be deemed to have been entered into in the State of California, and its validity, effect, and operation shall be determined according to California law. If any provision of this Agreement is held to be invalid or unenforceable, such provision shall be enforced to the maximum extent permitted by law, and the remainder of this Agreement shall remain in full force and effect.

**AGREED AND ACCEPTED:** The undersigned has (have) read, understood and agreed to all of the terms and provisions of this Agreement, including, without limitation, the offer of enrollment, the obligation to pay Tuition and the arbitration provisions. The undersigned hereby certifies (certify) that I (we) am (are) all of the legal and custodial parent(s) or legal guardian(s) of the Student.

Signature:		Signature:	
Printed Name:		Printed Name:	
Date:		Date:	
Billing Address:		Billing Address:	
Email Address:		Email Address:	
Phone Number:	(        )	Phone Number:	(        )

**IF YOU HAVE MORE THAN ONE STUDENT ENROLLED AT THE SCHOOL, YOU MUST COMPLETE A SEPARATE ENROLLMENT AGREEMENT FOR EACH STUDENT.**

<b>FOR OFFICE USE ONLY:</b>			
Enroll/Tuition Deposit:	Date: _____	Check # _____	Check Date: _____ Amount \$ _____
TMS Enrollment:	Date: _____	Name: _____	Budget Amount \$ _____
	Date: _____	Name: _____	Budget Amount \$ _____

### ADDENDUM

**TUITION:** Pre-School and Elementary School (i.e., Pre-School through 5<sup>th</sup> Grade) tuition for the academic year shall be **\$22,585** (“PS/ES Tuition”). Middle School (6<sup>th</sup> through 8<sup>th</sup> Grade) tuition for the academic year shall be **\$24,360** (“MS Tuition” and collectively with PS/ES Tuition “Tuition”). The Enrollment Deposit is a one-time payment and is not applied to the payment of Tuition. The School offers the following three convenient payment options.

	SINGLE PAYMENT PLAN (Default plan if no other plan is selected.)		FOUR PAYMENT PLAN		TEN PAYMENT PLAN	
Description	Amount	Due Dates	Amount	Due Dates	Amount	Due Dates
<b>Returning Students</b>						
<b>Reservation Deposit</b>	<b>\$2,200</b>	February 15, 2012	<b>\$2,200</b>	February 15, 2012	<b>\$2,200</b>	February 15, 2012
<b>Billing Fee</b>	<b>\$0</b> (if paid directly to SFS)	N/A	<b>\$55</b>	July 5, 2012	<b>\$165</b>	July 5, 2012
<b>PS/ES Tuition Payment(s)</b>	One payment of <b>\$20,385</b>	August 5, 2012	Four payments of <b>\$5,110</b> each	July 5, 2012 September 5, 2012 November 5, 2012 January 5, 2012	Ten payments of <b>\$2,055</b> each	The 5 <sup>th</sup> of each month with the first in July 2012 and the last in April 2013
<b>MS Tuition Payment(s)</b>	One payment of <b>\$22,160</b>	August 5, 2012	Four payments of <b>\$5,553.75</b> each	July 5, 2012 September 5, 2012 November 5, 2012 January 5, 2012	Ten payments of <b>\$2,232.50</b> each	The 5 <sup>th</sup> of each month with the first in July 2012 and the last in April 2013
<b>New Students</b>						
<b>Enrollment Deposit</b>	<b>\$1,100</b>	February 15, 2012	<b>\$1,100</b>	February 15, 2012	<b>\$1,100</b>	February 15, 2012
<b>Billing Fee</b>	<b>\$0</b> (if paid directly to SFS)	N/A	<b>\$55</b>	July 5, 2012	<b>\$165</b>	July 5, 2012
<b>PS/ES Tuition Payment(s)</b>	One payment of <b>\$22,585</b>	August 5, 2012	Four payments of <b>\$5,660</b> each	July 5, 2012 September 5, 2012 November 5, 2012 January 5, 2012	Ten payments of <b>\$2,275</b> each	The 5 <sup>th</sup> of each month with the first in July 2012 and the last in April 2013
<b>MS Tuition Payment(s)</b>	One payment of <b>\$24,360</b>	August 5, 2012	Four payments of <b>\$6,103.75</b> each	July 5, 2012 September 5, 2012 November 5, 2012 January 5, 2012	Ten payments of <b>\$2,452.50</b> each	The 5 <sup>th</sup> of each month with the first in July 2012 and the last in April 2013

**Payments and TMS:** All Tuition payments are processed through TMS. For returning students, the current account set-up will continue. For new students or returning students who would like to initiate a new account, please select the appropriate payment option and obtain a TMS Tuition Payment Plan Options Form (the “TMS Form”) from the Front Desk or Business Office. TMS will send a confirmation for account set-up. TMS will send a billing statement approximately twenty five (25) days prior to each payment due date. Payments are due no later than the 5<sup>th</sup> of each month. Payments may be made by check, money order, phone or direct debit or online. All payments are to be made directly to TMS. Instructions for each form of payment can be found at [www.afford.com](http://www.afford.com). Questions about processing payments should be made directly to TMS. Questions about the amount of an invoice or changes to an account should first be directed to the School’s Business Office.

**INDEXED TUITION:** To assure economic diversity and access to the School, not every student is charged full Tuition. Families who apply and qualify for reduced tuition, may be granted an “Indexed Tuition” from the School. Indexed Tuition is based on a complex calculation done by the School and Student Service (“SSS”), a financial service of the National Association of Independent Schools (“NAIS”). In addition, the School considers each family’s special circumstances and available funds. For more information about Indexed Tuition see [www.sfschool.org/admissions/index\\_tuition](http://www.sfschool.org/admissions/index_tuition).

**EXTENDED DAY FEES AND CHARGES:** Extended Day Programs are the programs and childcare offered between 7:30 a.m. and 8:00 a.m. in the morning and between 2:45 pm and 6:00 p.m. in the evening for days on which classes are scheduled (“School Days”). After School Events are events scheduled after 6:00 p.m. on School Days and at any time on non-School Days. The fees and costs associated with Extended Day Programs and After-School Events is described in [www.sfschool.org/life/extended\\_day](http://www.sfschool.org/life/extended_day).

**TEMPORARY LEAVES OF ABSENCE -** The School understands that families have both opportunities and requirements that may take them away from the School for an extended period of time. To support such opportunities, the School may agree to grant a temporary leave of absence (“TLA”) if the following conditions are met.

1. An application for TLA must be submitted to the Admissions office along with the usual re-enrollment deposit during the annual re-enrollment period but not later than February 15<sup>th</sup> of the academic year prior to which the TLA is sought. The School shall decide, in its sole discretion, whether to accept a TLA application and hold a space open for a Student.
2. If a TLA is granted, the family must execute a TLA Agreement with the School in behalf of each Student taking a TLA and pay (a) 75% of annual tuition for TLAs of five months to one year or (b) 100% of annual tuition for TLAs of less than five months. (The School does not grant TLAs of more than a year and will not grant more than one TLA to any Student.) Before returning to the School, the family must (i) on or before

February 15th complete and execute a re-enrollment agreement and pay the applicable re-enrollment deposit for the year following the TLA and (ii) provide an academic transcript and supporting information for the academic material covered during the TLA. Upon return to the School, the School may require the Student to take certain placement exams and/or repeat certain academic material and shall at its sole discretion place the Student in the appropriate academic program.

3. If a TLA is not granted or if a TLA is granted but the conditions of the TLA Agreement are not met, the School shall not hold a space open for the Student. Such Students will need to re-apply to the School during the regular enrollment cycle. For more information on the School's admissions process and enrollment cycle, please see [www.sfschool.org/admissions](http://www.sfschool.org/admissions).

**BEYOND TUITION:** Tuition does not cover the full cost of a student's education at the School. All families are, therefore, expected to participate in the Annual Fund and all other School fundraising efforts (including periodic campaigns for capital improvements and the School's endowment) at a level consistent with their capability. The School relies on 100% parent participation in all fundraising events and expects donations that are consistent with each family's ability to give. This participation and generosity are key to maintaining a moderate tuition and economically diverse student body. In addition to financial contributions, parent and guardian volunteer participation is essential to the overall functioning of the School. All parents and guardians are expected to be personally involved in the School in a capacity appropriate to their interests and skills. Contributions are tax deductible. Please go to [www.sfschool.org/giving](http://www.sfschool.org/giving) to learn more.