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# ACCESSIBLE TO ALL (ATA) TUITION ADJUSTMENT PROGRAM

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## INTRODUCTION

In fall 1993, the Waldorf School of the Peninsula in Los Altos, California, started a tuition adjustment program based on a commitment to make Waldorf education accessible to all families who value it. An article, “Reality and Process”,<sup>1</sup> presented at the West Coast Economic Conference in spring 1993, was the initial inspiration for this program. Although other Waldorf schools have adopted this model and made modifications, Waldorf School of the Peninsula’s tuition adjustment program is noteworthy for having successfully sustained the original program for more than ten years and having contributed significantly to the spiritual and social growth and economic stability of the school.

The following article connects independent Waldorf schools accessible to all with Rudolf Steiner’s basic principles in the founding of the first Waldorf school in 1919. The second section of the article provides details of the implementation of a tuition policy and program based on accessibility to all.

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<sup>1</sup> Robert Lathe and Nancy Whittaker, “*Reality and Process – Waldorf Schools, Budgets, and Community*,” 1993.

## PART 1: SOCIAL TRANSFORMATION AND WALDORF EDUCATION

### The Threefold Social Organism and the First Waldorf School

Anthroposophy, as a worldwide spiritual movement, is connected to approximately ten thousand groups and institutions. Some of the most well known of these institutions are Waldorf schools. The task of anthroposophy is action based on insight. Such insight, based on the threefold social organism and the impulse for social change, inspired the first Waldorf school, founded in Stuttgart in 1919 by Emil Molt, director of the Waldorf-Astoria factory.

As we begin this century we must again ask ourselves how true social progress will be made. The original impulse that guided Emil Molt and Rudolf Steiner in establishing the first Waldorf school is stated by Rudolf Steiner in *Soul Economy and Waldorf Education*: “But in our case there was no question of founding yet another country boarding school, nor of implementing a particular brand of educational principles. Our aim was to attempt to heal social ills and to serve the needs of mankind in general.”

When in July 1917 Rudolf Steiner presented his proposal addressing the problems of society at that time to the German and Austrian governments, internal turmoil made any consideration of his ideas impossible. Steiner realized that the needed social change could not result from political coercion or upheaval. A truly human society could only be the outcome of fully developed capacities of thinking, feeling, and willing.<sup>2</sup> Human social change would not be possible until a sufficient number of people had received an education that undertook to develop complete human beings.

In starting the first Waldorf school, based on the threefold social organism, Rudolf Steiner regarded these basic principles as necessary:

1. Independence from the state in developing the curriculum
2. Education of boys and girls together
3. Attendance of all children who so wished
4. Freedom of the teacher in the classroom
5. School self-administration
6. Development of capacities for the future
7. Understanding of the child’s development of spirit, soul, and body<sup>3</sup>

### The Art of Waldorf Education

Waldorf education is based on spiritual knowledge and an understanding of human development. During the first seven years, when children learn by imitation not only of our actions but also of our thoughts and feelings, a healthy environment is essential. This gives children the capacity to be free individuals later in life. From the ages of seven through fourteen a respect for authority and an environment worthy of reverence will give children the capacity to truly comprehend equality in the rights realm. From fourteen to the age of twenty-one students learn out of a sense of love and respect. The teachers and community must therefore demonstrate a love for humanity, enabling students in adulthood, to comprehend brotherhood and sisterhood in the economic realm.

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<sup>2</sup> Rudolf Steiner, *The Spirit of the Waldorf School* (Anthroposophical Press, 1996), Introduction, xiii.

<sup>3</sup> Rudolf Steiner, *Faculty Meetings with Rudolf Steiner* (Anthroposophical Press, 1998), Introduction, xxvi.

Steiner regarded the social and moral learning of the child as one of the core questions of education. He felt that education was not a question of what knowledge children needed to acquire to enter society, but of what capacities human beings could develop to bring new forces into society. “The task of education is no longer integrating the child into society in such a way that it receives its further formation from society. Today it is the contrary which is important: the child seeks an education which makes it possible to allow its own forces, the source of new development possibilities, to flow into our existing society.”<sup>4</sup>

Steiner characterized the basic task of education as overcoming egoism. “When you turn to your work, do not forget that all of modern culture, right into the spiritual areas, is based upon human self-interest. We live in a time when we must combat this appeal to human selfishness in all areas if people are not to go even farther down the declining cultural path they now tread.”<sup>5</sup>

## The Role of the Community

Tasks of Waldorf education include the recognition of the child’s developmental stages and the teacher’s self-development. For Rudolf Steiner, the honest struggle for self-transformation on the part of each individual teacher was necessary. The need for self-development and transformation extends to all members of the community actively involved in the education. Waldorf education is not limited to what happens in the classroom. The child’s environment includes the larger school community. It is essential that all aspects of the school community operate out of the same spiritual and social understanding that underlies the education. The health of the school depends on each individual and group working with the school as a living whole.

Siegfried Finser gives an example of the spiritual and transformative work of adults in the school community in an article, “The Organization of the Waldorf School.” The chief responsibility of the board is “the spiritual task of incarnating the being of the school into its full reality.”<sup>6</sup> The role of the parents in supporting Waldorf education is also vital. Manfred Leist in “Parent Participation in the Life of a Waldorf School” outlines two motives for the existence of Waldorf schools: the renewal of education based on a spiritual knowledge of the whole human being and the school as a working model for a social community. “The spiritual task of the parents is first to acquire a real understanding of the ideas and reality of the threefold social organism in order to develop a constant, progressive transformation of existing social conditions.”<sup>7</sup>

The success of a school community depends on its ability to work together with mutual understanding. Rudolf Steiner points to the importance of seeing and understanding the school community as a living whole engaged in serving the school’s spiritual and social mission:

*“And if any man works for the community, he must perceive and feel the meaning and value of this community, and what it is as a living, organic whole. He can only do this when the community is something other and quite different from a more or less indefinite totality of individual men. It must be informed by an actual spirit in which each single person has his part ... The whole communal body must have a spiritual mission, and each individual of it must have the will to contribute towards the fulfilling of this mission. In every single member down to the least, this Spirit of Community must be alive and active.”*<sup>8</sup>

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<sup>4</sup> Annual Report of the Pedagogical Section of the Anthroposophical Society, 1997.

<sup>5</sup> Rudolf Steiner, *Foundations of Human Experience* (Anthroposophical Press, 1996), Forward.

<sup>6</sup> Siegfried Finser, “The Organization of the Waldorf School”, *Renewal* (AWSNA, Fall/Winter 1995), pp 14-18.

<sup>7</sup> Manfred Leist, “Parent Participation in the Life of a Waldorf School”, (AWSNA, Winter 1987), p. 13.

<sup>8</sup> Rudolf Steiner. *Anthroposophy and the Social Question* (Mercury Press. 1996). pp. 25-26.

## PART 2: IMPLEMENTATION OF A TUITION ADJUSTMENT PROGRAM

*“The great problem of the future will be that of education. How will we have to deal with children so that they, as adults, can grow into the social, democratic, and spiritually free areas of living in the most comprehensive way? Spiritual science has pointed to this problem of education that present-day humanity will have to understand if it wishes to advance. Social demands will remain chaotic if it is not seen that at their base lies the most urgent problem of the present time: the problem of education.”<sup>9</sup>*

Already thousands of children in the United States have experienced Waldorf education and are contributing to social transformation in the world. One of the main challenges for Waldorf schools in North America is finding a way to include children from all economic levels in society while maintaining Waldorf schools as independent and self-administered schools. Our task is to work in a manner that is consistent with the goal of becoming a source of social change. If the acceptance of a child into the school depends on the financial resources of the child’s family, the school is not working toward its mission of promoting the betterment of society. The tuition adjustment program is a way of attempting to work out of the original impulse of Waldorf education by making this education accessible to all families who value it. Through the tuition adjustment program, the acceptance of a child into the school does not depend on the financial resources of the child’s family.

Several Waldorf schools are currently working with a tuition model based on the ideal that a Waldorf education should be accessible to all families who truly value it, whatever their economic status. Making this education accessible to more families is a step in working with a threefold understanding of Waldorf education. The tuition adjustment process is not just an economic activity -- its success lies in the understanding of all three aspects of the process. First, the path that leads the child and family to a Waldorf school and to acceptance into the class by the teacher is a spiritual activity. Second, the needs and well being of the school and the family are recognized through meeting each other as equals in a conversation to determine, in consensus, the family’s contribution. And third, the recognition that we are dependent on each other reflects the economic realm. There is a conscious placing of what is needed for the well being of the whole school community ahead of self-interest.

If a family is unable to meet the school’s tuition guidelines, the family completes a tuition adjustment application and meets with two members of the tuition committee. During this meeting the group closely reviews both the school’s budget and the family’s budget. Neither the family nor the school determines the tuition amount, and neither maintains a comfortable position in this process; each stretches to meet the needs of the other. The final step in this meeting is to arrive, by consensus, at a tuition amount.

The tuition adjustment program does not lessen the strong sense of fiscal responsibility. It also requires thorough budget preparation and ongoing review for continuous progress and the achievement of goals based on the values and ideals of Waldorf education.

### Tuition Adjustment Program Details

“What each individual really needs can only be known by himself; what he should contribute he can determine through his insight into the situation as a whole.”<sup>10</sup>

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<sup>9</sup> Rudolf Steiner, *Education as a Social Problem* (Anthroposophical Press, 1984), p. 12.

<sup>10</sup> Rudolf Steiner, *Towards Social Renewal* (Rudolf Steiner Press, 2000).

With the tuition adjustment model, economics do not enter into the perception and acceptance of a child into the school. The teacher accepts a child into the class and fosters with the family an understanding and commitment to Waldorf education and the underlying ideals. The school is dedicated to providing this education to families drawn and committed to Waldorf education. Each child is appreciated and seen as an incarnating being with unique gifts and a destiny.

The following is a detailed description of a recommended admissions and tuition adjustment process:

## The Enrollment and Admissions Process

Each inquiry and enrollment package includes information about the tuition guidelines and tuition adjustment program. A family that cannot meet the tuition guideline completes a tuition adjustment application and submits it with a copy of their pay stubs and tax return. Once the school has received and reviewed this paperwork, a conversation is scheduled. The business manager reviews information for completeness and notes any relevant questions for tuition committee members to ask during the conversation.

## The Tuition Adjustment Conversation

*The healthy social life is found  
When in the mirror of each human soul  
The whole community finds its reflection,  
And when in the community  
The virtue of each one is living.*

~Rudolf Steiner, *Motto of the Social Ethic*

The “Motto of the Social Ethic” serves as a mission statement of the tuition adjustment program. During the conversation with a family, tuition committee members portray a full picture of the school, including the school’s economic life, values, and ideals. The school’s biography, current strengths and weaknesses, and future plans contribute to this picture. The family has an opportunity to contribute ideas to the school’s current operations and its long-term planning. Through these conversations, the school learns more about the members of the community and meets individuals with skills, capacities, and interest in serving the school.

*“But the problem of the present day is how to introduce people into the conditions under which each will, of his own inner, private impulse, do the work of the community ... Some possibility must be found of inducing each person, of his own free will, to do that which he is called upon to do according to the measure of his particular powers and abilities.”<sup>11</sup>*

~Rudolf Steiner

The tuition adjustment conversations begin with establishing a sense of warmth with the family through the acknowledgment of each person’s commitment to Waldorf education. For a new family to the school, the decision to enroll involves a serious commitment. For returning families, committee members express appreciation for the family’s contributions and support of the school in the past year. They briefly share their individual connection and commitment to Waldorf education and the school.

The family receives an outline of the conversation: the school’s budget and strategic plan, the family’s budget and future plans, and, through consensus, the determination of the tuition amount or contribution. Confidentiality is also established (see tuition worksheet).

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<sup>11</sup> Rudolf Steiner. *Anthroposophy and the Social Question* (Mercury Press, 1996), pages 26-27.

The school's budget is presented first. Each conversation, including the presentation of the budget, is unique. Some presentations, particularly for new families, include a detailed review of major budget categories. Within this budget presentation is a living picture of the school's past, present, and future. Conversations with returning families involve a budget overview with an emphasis on the school's present and future needs. Every budget presentation involves a picture of the school as a whole, including its mission, vision, and values. It also includes the strengths and weaknesses of the school within the context of its continuing development and commitment to Waldorf education.

The family presents its budget. This often includes circumstances, present needs, and future hopes of the family, as well as its values. After this sharing of school budget and family budget, the group determines the tuition amount through consensus. Both the school's needs and the family's needs are brought into balance in this process. The school representatives then complete a contract amendment and give the family a copy. The conversation ends with appreciation and acknowledgement of the family's commitment to Waldorf education and its contributions and support of the school and the community.

The family receives by mail the agreed-upon payment plan invoices. The business manager follows normal collection procedures with any past due balances. The family is usually contacted by phone during the year to see if any changes have occurred in their income or expenses. If a family's financial picture changes, the family meets again briefly with the same tuition committee members and the contract and tuition amount is adjusted to reflect those changes.

## The Tuition Adjustment Committee

A significant amount of the work in meeting a school's needs is accomplished through conversations with members of the community. Tuition adjustment committee members dedicated to this work must therefore have a healthy relationship with the school and understand the social and spiritual ideals of Waldorf education. Members represent the interest of the school community as a whole, especially the teachers and children, while holding and appreciating the needs of each individual family. The members of the committee understand the school's long-range plan and vision and are able to articulate the school's needs; by doing this, they encourage each family to contribute the most it possibly can to support the school.

## Development Conversations

*“Conversation is the process by which two or more individuals come together to create a whole more than the sum of their parts. They must listen to each other and to what comes into form through – and only through – the conversation.”<sup>12</sup>*

~ Christopher Day

Schools with a tuition adjustment program are often committed to having a conversation with every family annually as part of the ongoing work toward healthy organizational development and as a result of the immeasurable value of conversations with families participating in the tuition adjustment program. Development conversations ensure that the long-range plan is truly a living document, evolving and reflecting the community's ideas and vision. The conversations include the school's history, accomplishments, and goals. Gratitude is expressed to the family for its contributions to the school's success. From these conversations the school gains knowledge of skills and expertise of members of the community and future opportunities for meaningful participation of individuals in specific tasks or committee work. The conversations are also a way of providing an opportunity for families to contribute beyond the suggested tuition through gifts to the annual giving fund.

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<sup>12</sup> Christopher Day. *Places of the Soul* (The Aquarian Press, 1990), p.57



## Tuition and Development Conversations as a Social Practice

*This always happens in the meeting between two people – a tendency to fall asleep – a tendency to keep awake. The tendency to fall asleep represents a social force in the human being, analogous to our sleeping state when our soul and spirit freely intermingle with the soul and spirit being of others, unencumbered by the physical body. The waking-up force is anti-social in nature as we become aware of our identity, our thoughts, feelings, and intentions as earthly beings.*

~ *The Archetypal Social Phenomenon, Rudolf Steiner*<sup>13</sup>

Rudolf Steiner described the anti-social nature of modern consciousness and the loss of social instincts that make the human more and more like a “hermit wandering through the world.” Self-knowledge and development separate individuals and groups so that they become as strangers to each other. Misunderstandings, conflicts, and forces of social fragmentation are visible in every sphere of life and blind us to our connections of destiny.<sup>14</sup> Anthroposophical institutions and the threefold social order provide the social space and practice to meet each other, struggle, and develop understanding. Conversation contains the possibility of a healing process for society and for individuals. Healing through conversations and deep listening can develop new capacities for understanding and compassion. Healed inner wounds can become organs of perception.<sup>15</sup>

## Conclusion

A school should not adopt a tuition policy for purely economic reasons or to remedy specific problems without careful considerations, including a detailed picture of the spiritual, social, and economic life of the school.

*“A bald economic theory can never act as a force to counteract the powers of egoism. For a while such an economic theory may sweep the masses along with a kind of impetus that, to all outward appearance resembles the enthusiasm of an ideal. But in the long run it helps nobody. Anyone who inoculates such a theory into a mass of human beings, without giving them some real spiritual substance along with it, is sinning against the real meaning of evolution. There is only one thing that can be of any use; and that is a spiritual world-conception, which, of its own self, through that which it has to offer can make a living home in the thoughts, in the feelings, in the will -- in man’s whole soul, in short.”*<sup>16</sup>

Our human development and the forces of critical intelligence and egotism have increasingly made us more anti-social. The challenges of our time are met through inner development and the transformation of egotism and anti-social feelings. Working with the ideals of the threefold social organism and social transformation in Waldorf education means transforming our capacities as we work together. Chris Schaefer, a consultant to many Waldorf schools, reminds us that “a just and more human society requires both social transformation and inner development. Such a process involves utilizing individual consciousness to order and transform our soul capacities of thinking, feeling, and willing, so that doubt is transformed to interest, likes and dislikes into empathetic understanding, and egotism into acts of compassion.”

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<sup>13</sup> Dieter Brull, *The Mysteries of Social Encounters* (AWSNA, 2002), p. 20.

<sup>14</sup> Ibid

<sup>15</sup> Margaret Van Den Brink, *More Precious Than Light* (Hawthorn Press, 1996), Introduction.

<sup>16</sup> Rudolf Steiner, *Anthroposophy and the Social Question* (Mercury Press, 1996), p. 27.

## APPENDIX A: ACCESSIBLE TO ALL (ATA) FREQUENTLY ASKED QUESTIONS

*The following questions and answers are meant for people who have read the “Accessible To All (ATA) Tuition Adjustment Program” essay by Bob Mosen and Mary Roscoe. A thorough answer to each question would require a personal conversation with an Institute For Social Renewal member.*

### 1. Do you have a suggested tuition, and if so, how do you determine what it should be?

Yes, schools that have implemented the accessible-to-all tuition adjustment program have a suggested tuition. The setting of tuition is often an intensive and challenging process that takes place mid-year in most schools. The process in determining the school’s capacities and the suggested tuition is healthier if the budget review, strategic planning, and communication with all members of the community are ongoing rather than an annual event.

### FINANCIAL AND LONG TERM PLANNING

A three to five-year budget projection provides a solid foundation for tuition setting and future planning. The budget cycle is a year round process that includes a review of the current budget, review of increases or decreases in income and expenses, draft of a preliminary budget for the coming school year, recommendations for a tuition increase, budget revisions, final adoption of the preliminary budget, budget review with the actual enrollment numbers (after the start of the new school year), budget revision based on the actual enrollment (if necessary), and approval of the final budget.

Factors that help provide a basis for discussions about suggested tuition increases are: the cost of living index increase, the area’s median family income, economic trends, and tuition surveys that include other private schools in the area. One of the important factors in setting the tuition is determining the needs and capacities of the community – parents, faculty, and the greater community.

The enrollment and development programs and the articulation of the school’s mission, vision, and values play a vital role in the school’s growth and progress. A strategic plan with short, mid-term, and long-term goals that the entire community has participated in and prioritized enables the community to determine its readiness and capacities to take the next steps in the school’s development.

### COMMUNICATION

Typically, the board and administration meet with parents for an annual budget meeting and make presentations, provide written information, and listen to the community’s responses – even with extensive meeting planning and preparations, quite often there may be the feeling of a lack of transparency. Rather than annual meetings or one-time events, focus groups or meetings with parents that occur on a monthly or quarterly basis contribute more to the health of the school and inform the board’s decision-making process. Individual conversations with families also contribute to a collective understanding of the school’s needs and capacities. Through this understanding parents provide ideas and significant contributions to the school’s future and well-being. A three to five-year budget projection provides the community with a sense of confidence in the school’s future and knowledge of what is needed to move toward common goals and the school’s strategic plan.

2. What are some important factors to take into consideration when trying to successfully implement an ATA program?

Significant factors that ensure the success of the tuition adjustment program are:

The implementation of the tuition adjustment program as a social practice that embodies the school's core values including:

- Active listening
- Appreciation of differences and the development of individual capacities.
- Servant leadership as a working principle in the school's governance.

The community's engagement in active learning and renewal through the study of the mission of Waldorf education and the threefold social order.

3. What are some other considerations to be concerned about when trying to implement an ATA program?

Other considerations are:

- A tuition program based on accessibility to all will not be successful if it is adopted for economic reasons alone.
- The tuition adjustment model cannot operate separately from the rest of the school. The social practice and value of the program must be reflected in all areas of the school.
- The health of the program depends on the school's health in other areas including responsible budgeting and financial practices.
- A commitment and dedication to the program, both collectively and individually, is needed that includes the acknowledgement of the value of the conversations.
- Tuition adjustment and development committee members must have good listening and communication skills, including the ability to inspire parents to contribute to the well-being of the school and to consider the support of the school as a priority in their lives.
- Members of the tuition adjustment and development committee need to engage in renewal through the ongoing study of the threefold social organism.

4. How is it possible to have tuition adjustment conversations and development conversations with members of the community – isn't it a lot of time?

Yes, the conversations require a commitment of time but have many benefits. The conversations often provide an orientation for new families, and for established families the conversations take the form of an annual report and check-in. The results of the individuals' understanding of the school's needs and the school's appreciation of the family are immeasurable – significant contributions are made out of this understanding and appreciation of the school.

For the tuition committee member, the conversations challenge each person to articulate what is important and critical to the school as well as to actively listen for what is essential or important for the family. Balancing the school's and the family's needs in tuition adjustment conversations requires the inner development of each person and is of significant social value as a practice.

5. Is there a special training for school representatives to conduct the conversations?

Yes. Training for the tuition and development conversations by someone experienced in the ATA approach includes an understanding of the school's:

- Mission, vision, and values
- Biography or history, including strengths and challenges
- Budget, including a detailed knowledge of income and expenses
- Strategic plan – short and long-term needs

- It also requires the commitment and ability to:
- Actively listen and have a genuine interest in and appreciation for the family and school
- Represent the school and articulate the school's needs, goals, and vision
- Read and understand the school's budget and the family's financial documentation
- Balance the school's and family's needs

It is important to plan the training with an experienced person. Follow-up training in subsequent years is not only highly recommended but also essential for a healthy program.

6. What are the recommended steps if a school is interested in implementing the ATA tuition adjustment program?

The recommended steps are:

- Educate all members of the community about the social mission of Waldorf education through articles, books, and talks
- Arrive at a general agreement with the school community to adopt the program
- Formally adopt the tuition adjustment program
- Review the school's budget and budget assumptions
- Articulate the school's mission, vision, and values, including the school's strategic plan
- Develop the tuition adjustment application, forms, and other written material
- Finalize the preliminary budget
- Form a tuition committee – determine the mandate, membership, etc.
- Schedule and conduct the tuition committee training
- Begin the tuition adjustment conversations
- Work closely with the development committee to implement development conversations.
- Monitor and review the tuition adjustment program on an ongoing basis. Work closely with the finance committee to review actual income vs. budget.

7. In terms of enrollment, income, and balanced budgets, how successful was the ATA program at the Waldorf School of the Peninsula over the first 10 years of its implementation?

The tuition adjustment program started in the 1993-94 school year and has continued successfully and contributed to the growth of the school in many ways. For a quick overview of the program's history, the financial and enrollment figures are included below:

SCHOOL YEAR	1993-1994	1998-99	2003-2004
Total Tuition Income	465,443	1,410,028	2,365,750
Enrollment	113	215	243
Percent of Non-Staff Families part of ATA Program	37%	38%	37%
Average Tuition	3,695	5,275	8,265

Each school year ended with a balanced budget. Many of the years ended with a substantial surplus. The highest percentage of families participating in the tuition adjustment program was 50% in 1994-1996. The lowest percentage was 18% in the 2000-2001 school year.

8. To what degree have schools experienced discord between parents who receive tuition adjustment and those who pay the full-suggested tuition? And what can a school do to promote overall harmony amongst the parents?

There is generally little concern expressed by full-paying parents if the ATA program is introduced in a way that affirms the school's values. Questions about the tuition adjustment program are usually asked, especially from parents new to the school, during discussions following budget presentations with proposed increases in tuition. The program at Waldorf School of the Peninsula has remained intact, has largely been supported by parents through the years, and is regarded as one of the school's central strengths. To promote understanding and support of the program, it is important to educate the community on an ongoing basis about the original intentions of Waldorf education and the tuition adjustment program through parent orientations, written materials, and all school meetings.

Part of the understanding of all participants in the tuition adjustment conversation is confidentiality. Confidentiality minimizes talk between parents about varying levels of support and questions about the actual need of families in the program. Social discord usually arises if tuition is viewed as a commodity with some paying more and others paying less. It is minimized when there is the understanding that as a community we are interdependent and everyone contributes the most they are able to the well-being of the school.

9. How do economic trends and economic demographics affect the ability of a school to successfully implement the ATA approach?

Neither the tuition adjustment policy nor any other tuition policy will change the economic realities of the geographical area; the tuition guideline and budget need to reflect the area's economic reality. Economic trends and funding are a concern of every school, including public schools. With the downturn of the economy, the Waldorf School of the Peninsula was able to retain families who would otherwise not have been able to remain at the school. The program stabilized enrollment at a time when other schools were experiencing a sharp decrease in enrollment. Ideally, a school will represent the full range of the economic and cultural diversity of the area.

It is vitally important to continually monitor the school's budget and actual income and expenses and assess the capacities of the community through annual giving and other funding. Although it is expected that the tuition adjustment and finance committee are working closely together, the "success" of a tuition adjustment program isn't solely measured by a balanced or surplus budget. Through its social values of accessibility to all and financial contributions, the program contributes significantly to the growth and progress of a school when it is implemented responsibly in a healthy organization.

Finding additional sources of income to fund Waldorf education is critical in providing independent Waldorf education accessible to all. This is an area of active research of the Institute for Social Renewal.