

Policy on Religious School and B'nai Mitzvah Charges

Adopted by Board of Directors on January 22, 2020

Effective March 1, 2020

11. Religious School and B'nai Mitzvah Charges

This Section concerns *only the financial charges* associated with the Religious School, the Teens Programs and B'nai Mitzvah preparations. Policies that govern other activities pertaining to those areas may be found in the "BAR / BAT MITZVAH" and "RELIGIOUS SCHOOL" policies.

All requirements in this Section 11 apply to the Religious School (up to and including grade 7), the Teen Programs (grade 8 and above) and the B'nai Mitzvah preparations, unless specified otherwise.

11.1. Religious School and Teen Program Tuition and Fees

The word "Religious School" in this subsection refers to both the Religious School and the Teen Programs.

11.1.1. Tuition and fee schedule.

(a). Tuition and fee schedule for a school year is proposed by the VP of Education and must be submitted to the Board of Directors before the March regular meeting of the Board. The Board of Directors must approve any changes to the fee schedule before May 1st.

(b). The schedule presented to the Board must include:

- (i) tuition and fees for various grades;
- (ii) mandatory and optional fees, if any, not included in the above tuition and fees, for example, textbook fees, cost of snacks, religious items, etc.;
- (iii) the due date for a full tuition and fee payment;
- (iv) various discounts/surcharges, if any are offered, for example: discounts for early payments, surcharges for late (i.e., after the due date) payments, multi-child discounts, etc.

(c). Tuition and fees must be paid in full by the due date, unless special payment arrangements are made (see subsection Special Arrangements).

(d) A student cannot be enrolled in the school for the next year, if there is an unpaid tuition and fee balance from the previous school year.

11.1.2. If a student is enrolled in the religious school after the first day of school but before January 1 of the following year, the full tuition applies. If a student is enrolled after January 1, the tuition is reduced by 50%. In both cases, the tuition must be paid before the first day the child attends the school, unless special payment arrangements are made prior to that day (see subsection Special Arrangements)

11.1.3. If a student withdraws from the school prior to the end of the school year, a tuition and fee refund will be given depending on the withdrawal date as follows:

- within 3 weeks from the first class the student attends – a pro-rated refund will be given.
- after 3 weeks, no refund will be given. The pro-rated balance may be applied to the member's sustaining contribution or annual campaign pledge. The Financial Secretary may approve a refund under extraordinary circumstances (e.g., moving out of the area).

In all cases, a refund will not be given if the student's member unit is in arrears with any tuition payments or other financial obligations.

11.2. B'nai Mitzvah Charges

11.2.1. Fees

(a). According to the "Bar/Bat Mitzvah Policy", Section 16, the B'nai Mitzvah charges include *B'nai Mitzvah Fee*, used to partially offset the personnel and material costs incurred by the Congregation in the

preparation and supervision of the B'nai Mitzvah candidates. In the context of this financial policy, this fee also includes B'nai Mitzvah tutoring.

(b). In order to ease the financial burden on the family and encourage the family to complete the B'nai Mitzvah process, the fee payments are spread over several years and include the following steps:

- (i). The B'nai Mitzvah date is reserved when the student is in 5th grade, around 24 months before the B'nai Mitzvah date. A letter sent to the student's family at that time describes all expected payments.
- (ii). Half of the B'nai Mitzvah Fee is billed 18 months before the B'nai Mitzvah date.
- (iii). Second half is billed 12 months before the B'nai Mitzvah date.
- (iv). Tutoring starts no later than 6 month before the B'nai Mitzvah date. The family must be current on all financial synagogue obligations, including Religious School fees and the B'nai Mitzvah fees, for the tutoring to start.

(c). Fees listed in item (a) are established for a fiscal year and apply to the students whose B'nai Mitzvah dates will be reserved that year, per step 11.2.1.(b)(i). The fees established for students in prior fiscal years do not change, even if the payments are due this year.

The fees are proposed by the Ritual VP and must be submitted to the Board of Directors before the March regular meeting of the Board. The Board of Directors must approve any changes to the fee schedule before May 1st.

(d). The fees must be paid by the due dates specified in item (b) above, unless special payment arrangements are made (see subsection Special Arrangements).

11.2.2. Per Bar/Bat Mitzvah Policy, the B'nai Mitzvah Fee is nonrefundable.

11.3. Special Payment Arrangements

11.3.1. No student will be turned away from the School or B'nai Mitzvah tutoring for financial reasons. Member families may apply for special payment arrangements, a.k.a., Special Arrangements. Special Arrangements may include fee reduction, an installment payment plan, or both.

11.3.2. Special Arrangement Form.

(a) Member families apply for special payment arrangements by filling out a Special Arrangement Form (SAF). To minimize paperwork, the same SAF is used for both the Religious School and B'nai Mitzvah Fees.

(b). The SAF is designed by the synagogue office and must be approved by the Finance and Budget Committee. It should include fields asking for family financial conditions, reasons for requesting special arrangements, the requested total Religious School (or B'nai Mitzvah) tuition and fees, and, if payment in installments is selected, the number of installment payments with the amount and date for each. SAF may also include other fields as considered useful by the office and/or the Financial Committee.

The installment payments for tuition should be in approximately equal amounts with the restriction that the first payment must be made by the full tuition due date, and the last payment cannot be later than April 1 of the school year.

All fields in the SAF must be completed by the applicant for the application to be considered.

(c). A blank copy of SAF must be included in the school application package and in the first communication with the family about scheduling a B'nai Mitzvah.

(d). A completed SAF must be submitted before the full tuition due date defined in 11.1.1.(b) and 11.2.1.(b). Delay with submitting a SAF does not eliminate the responsibility of a member to make the first payment by the full tuition due date.

11.3.3. Completed SAF must be approved by the Financial Secretary. The Financial Secretary may modify the requested fee discounts and the payment dates.

11.3.4. Special Arrangement Forms should be kept in the office for 5 years.

11.3.5. The confidentiality principles defined in the Financial Policy, Section 9.3, apply to the handling of special arrangements for tuition or B'nai Mitzvah Fees.

11.4. Compliance.

11.4.1. Financial Secretary is responsible for monitoring compliance with this Section 11 of the Financial Policy. Members of the Board and the staff must be familiar with the content of Section 11.

11.4.2. All fees listed in this Section "Religious School and B'nai Mitzvah Charges" are considered member's financial obligations as defined in the Bylaws, item 12.5.

11.4.3. In order to make sure that the Religious School and B'nai Mitzvah families are aware of their financial obligations and rights under this policy, the Financial Secretary will create two short versions of this policy, one for the Religious School and one for the B'nai Mitzvah preparations. The short versions should contain extracts from this policy listing member obligations, SAF requirements and the confidentiality statement. The corresponding versions should be included in the School Application package and in the initial B'nai Mitzvah communication in step 11.2.1.(b)(i).