



## Access, Affordability, and Inclusion

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Director of Admission  
The Hamlin School, San Francisco, CA

1

*It is not beyond our power to create  
a world in which all children have  
access to a good education*

Nelson Mandela



2

## Our Schools



3

## PROSPECT SIERRA

Diverse TK-8 co-ed day school located in El Cerrito, CA (San Francisco Bay Area)

**Our Mission:** Prospect Sierra students are passionate about learning. Our exceptional teachers inspire students to seek deep, meaningful understanding; to develop strong academic skills; and to become creative and independent thinkers. Prospect Sierra cultivates compassion, fairness, respect, and individuality within a community that celebrates diversity, authenticity, and service.

- PS Admission Director since July 2013
- Parent of an alum '17
- Bay Area Directors of Admission (BADA) - board member



4





Kindergarten - Grade 8 all girls school in San Francisco founded in 1863

**The Hamlin Mission:** The Hamlin School educates girls to meet the challenges of their time and inspires them to become extraordinary thinkers and innovators, courageous leaders, and individuals of integrity.

- Attended Hamlin for Grades 5-8
- Taught at Hamlin for 16 years and admission director for 17 years
- Parent of an alum '17
- Founding President of the Bay Area Directors of Admission (BADA)
- Currently serve on the AISAP board



5



## Why We Do This Work

6

## Renée's Story

- Born in Berkeley and raised in the Bay Area
- Public education kindergarten through university
- Emancipated minor at the age of 16
- Graduate of University of California, Los Angeles
- Independent School Administrative Roles (22 years):  
College Counseling, Summer Programs, Diversity  
Coordinator, Special Projects, Admissions and Outreach



*Ucla*



7

## Lisa's Story

- Born in San Francisco and moved to Guam at the age of 5
- Grades 1-4 Independent School on Guam
- Grades 5-8 at The Hamlin School in the late 1970's
  - one of few girls of color, middle class, one car, and renting
- Grades 9-12 at Lowell High School (public school)
- U.C. Berkeley (public university)



*Cal*



8

## What is your role at your school?

- Admissions and Enrollment
- Financial Aid Administrator
- Chief Financial Officer
- Communications and Marketing
- Head of School
- Division Head
- Educational Consultant



*Who did we miss?*



9

## What is Your 'Why?'



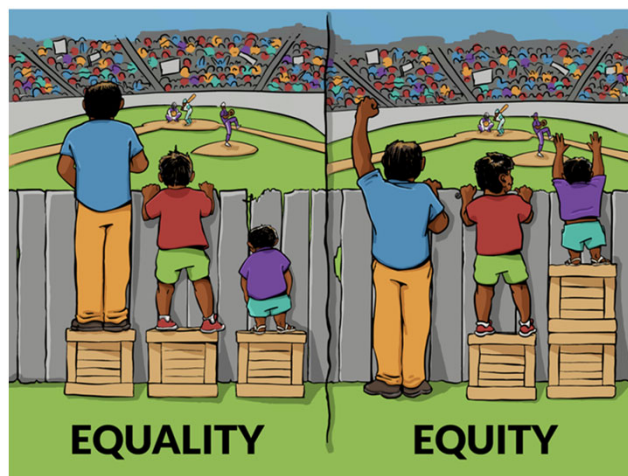
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Ted Talk  
Simon Sinek: How great leaders inspire action



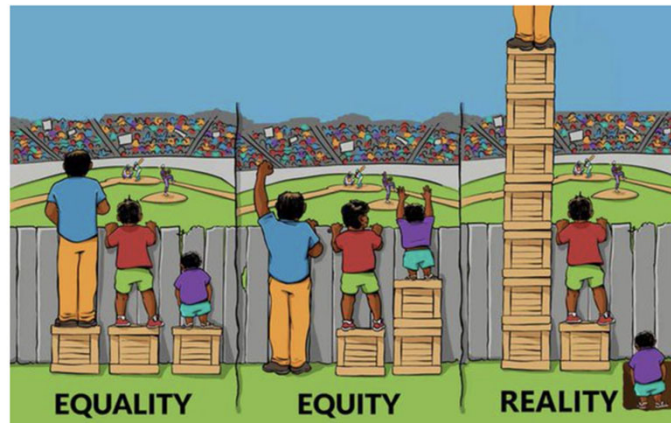
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## Equity vs Equality



12

## Equity vs Equality vs Reality

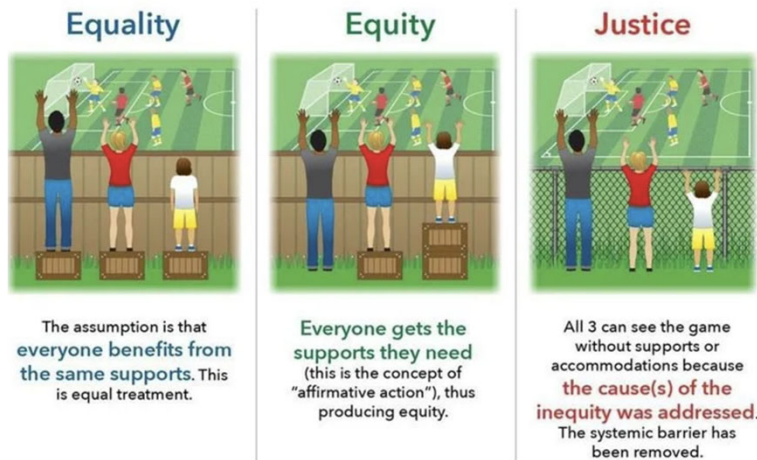


February 4, 2016 — <https://twitter.com/urbandata/status/695261718344290304>



13

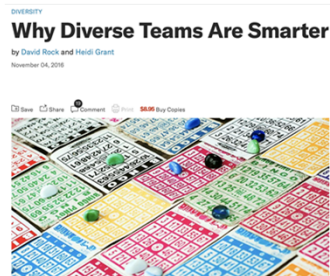
## The Ideal



14

## Socioeconomic Diversity: Making the Case for “Why”

- Look at our missions - “global citizens”  
“changemakers”
- Research shows a diverse group of people benefit and learn from each other with higher success
- Does your school support diverse SES students and families?



15

## Socioeconomic Status: Definitions in Your Community

- 2018 - A report from the Department of Housing and Urban Development says that a San Francisco metro area family of four bringing in \$117,400 a year qualifies as “low income.”
- How do you define class versus income?
- How does your school define middle income?

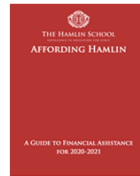


16



## Hamlin Financial Assistance

- **Inclusive Tuition:** Lunch, snack, books, materials and technology fees, school activities, field trips, and outdoor education
- **Payment Plans:** Single, double, quarterly, ten-month, and individual payment plans
- **Financial Assistance Program:**
  - 2019-2020: \$2.515 M; 15% of Operating Budget
  - SSS by Community Brands
  - Affording Hamlin Brochure
  - Affording Hamlin Workshops
  - Access Fund
  - FA Committee: CFO, Head of School, and Director of Admission
- **Need-blind Admission Decisions**



17

## Prospect Sierra Flexible Tuition

- **Inclusive Tuition:** 33% of our families utilize the program
- **Tuition Includes:** Books, materials, technology, school activities, field trips, and outdoor education
- **Payment Plans:** Two payments (May and Jan) or 11-month plan
- **Flexible Tuition Program:**
  - 2019-2020: \$2.2 M; 16% of Operating Budget
  - 84% revenue from student enrollment
  - SSS by Community Brands
  - FT Committee -- Head of School, CFO, Director of Admissions
  - Need-blind admission decisions
- **Not included:** Lunch, School Transportation, Extended Program



18

## Hamlin COVID-19 Response

- **T.H.E. Creed Fund-** The Hamlin Employees Creed Fund: Unexpected costs due to Covid -19, Distance Learning, and Sheltering-in-Place
- **Covid-19 Response Protocol**
- **Increased Tuition Assistance:** Due to job loss/furlough, Review based on family's financials looking forward
- **Access Fund:** A fund for Hamlin families beyond Tuition Assistance due to unexpected job loss/pay reduction/furlough



19

## Prospect Sierra COVID-19 Response

- **March 2020 - launched COVID-19 Financial Task Force**
  - Comprised members of:
    - Board - Finance Committee
    - Senior Admin - Head of School, CFO, Director of Admissions
  - Create two year emergency financial fund for families
- **April 2020 - Emergency Financial Support Program**
  - Released online application (google form and dropbox for attachments)
  - One year grant, no repayment needed
  - Applied to student tuition(s)
  - Wellness check in December 2020
- **May 2020 - Success!**
  - Attrition is less than 4% by enrollment agreement withdrawal deadline (April 30)
  - 40 families applied for Emergency Financial Support grants (~10% of families)
  - Program will run throughout the year as pandemic continues



20

## Financial Assistance: Questions to Consider

- 1) Are you involved in the FA process?
- 2) Are you responsible for gathering confidential FA docs?
- 3) Do you review FA files?
- 4) Do you do the calculations? If not, then who?
- 5) Do you project the need for FA in the school?
- 6) Enrollment projections in conjunction with FA needs
- 7) What is your partnership with FA committee? DEI experience/work?



21

## School Culture and Unspoken Expectations

Language matters. What we call events, vacations etc.

- Ski Week
- Christmas Break
- The Gala
- "Where did you go for X break" etc.
- Moms and Dads night out, Father Daughter Dances
- Midweeklies



22

## School Culture and Unspoken Expectations

- Microsoccer: organized team sports not sponsored by school
- Birthday celebration at school and at home
  - Prospect Sierra - bday circle; bday book created by students; no parents; MS girls can bring treat for advisory
  - Hamlin- free dress (bday or ½ bday), class love notes, treat for MS advisory only
  - Birthday parties outside of school- Parent Teacher Handbook
- Uniform vs free-dress: Hamlin- used uniforms- new uniform for families who cannot afford a new one; Prospect Sierra- equity issue
- Parent drivers for field trips



23

## Possible Costs Beyond Tuition

- Catered lunch option
- Athletic uniforms and school uniforms
- Extra-curriculars
- Technology
- Transportation
- Learning Services beyond school (Ex. OT, Educ Psych eval, Speech Language therapy)
- Outdoor and other educational trips during the school year
  - Camping gear: boots, packs, sleeping bags, tents
- Community/Fundraiser Events- Clearly define purpose and intent of event/ but impact can be unintended message
  - Hamlin story - Spring fundraiser: different price points and live auction eliminated
  - Prospect Sierra's story - still auction, and added "Count Me In" that have different price points, sponsored seats, walkathon
  - How to offer waivers? Hamlin: Winterfest, Prospect Sierra: "Count Me Ins"



24

# Reflection



25

## Articles

### Evolving and Reframing Financial Aid (or Flexible Tuition!)

Rosetta Eun Ryong Lee, Independent School Magazine, Winter 2020 - [Rexamining the Language of Financial Aid](#)

Andrew Cocco, AISAP February 2020 Blog - [Changing the Lens: Shifting the Conversation around Net Tuition Revenue](#)

**Check out the Summer 2016 issue of *Independent School* magazine, which is focused on access and affordability in an age of growing inequities. It includes articles such as:**

Christopher R. Tompkins, Independent School Magazine, Summer 2016 - [Financial Aid and a Growth Mindset](#)

Rasheeda Carroll and Jason David, Independent School Magazine, Summer 2016 - [Engaging in Meaningful Conversation on Socioeconomic Status and Class Identity](#)

Mark Mitchell, Independent School Magazine, Summer 2016 - [Removing the Barriers to Socioeconomic Diversity](#)

David Lourie, Independent School Magazine, Summer 2016 - [The Independent School Financial Model - Is It Sustainable?](#)



26

# Q & A



27

Thank you for joining us!



**PROSPECT  
SIERRA**

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28