



Comprehensive School Choice Playbook

Empowering Schools Through

- ✓ Service
- ✓ Technology
- ✓ and School Choice



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Introduction

This playbook is designed to help school leaders and staff confidently navigate the rapidly changing world of school choice. With practical strategies, best practices, and real-world guidance for every department, this resource provides a roadmap for turning policy into effective action—ensuring your school is ready to serve more families, manage new funding streams, and thrive in today’s evolving educational landscape.

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School Choice is Reshaping the Landscape

School choice is reshaping the landscape of private and faith-based education in profound and lasting ways. Once dependent primarily on tuition and philanthropy, many schools now have access to state-funded programs that make private education more affordable and accessible for families. This shift is driving enrollment growth, transforming funding models, and redefining how schools plan for the future.

As more families consider private education, schools face new opportunities—and new challenges. Strategic admissions planning, financial tracking, compliance oversight, and strong community messaging are now essential to long-term success. Schools must be equipped to manage multiple funding streams, meet evolving regulatory requirements, and differentiate themselves in a more competitive marketplace.

FACTS partners with states, SGOs, and schools to align policy, technology, and implementation—helping schools turn

school choice opportunities into sustainable systems that work. Our team empowers education leaders to navigate this evolving environment with confidence, using data-driven tools and hands-on support to deliver better outcomes for the communities they serve.

This playbook is designed to guide your team through the operational and strategic shifts required to thrive in a school choice era. By breaking guidance down by department—administration, admissions, marketing, business office, and financial aid—we offer practical insights and actionable steps that can be adapted to your school's needs. Whether you're just entering the ecosystem or looking to strengthen your current approach, this resource is here to help you move forward with clarity and purpose.

✓ Who This Playbook Is For

This playbook is designed for everyone involved in the operation and growth of private and faith-based schools. Whether you're part of the administrative team, admissions, marketing and communications, business office, or financial aid, you'll find department-specific strategies and tools to help you navigate school choice with confidence. Each section is tailored to your unique responsibilities, providing actionable guidance for your day-to-day work and long-term planning.



Watch For:
Tips and Spotlights

✓ How To Use This Playbook

This playbook is organized by department to provide targeted guidance for every area of your school impacted by school choice. Each section offers practical applications, best practices, and data-driven strategies to help your team navigate and integrate school choice into your existing operations. Whether you're in administration, admissions, marketing, the business office, or financial aid, you'll find insights tailored to your role—along with examples of how **FACTS** tools can support your work. Use this resource to assess your current processes, plan for growth, and ensure your school is positioned to thrive in a changing funding landscape.

Strategic Oversight & Compliance

DESIGNED FOR

► Superintendents, Heads of School, Principals, Department Directors, and Board Members

A school choice program exists in your state—now what? School leadership is central to determining whether and how to participate. Administrators set the vision and operational tone, ensuring that school choice implementation aligns with the school's mission, values, and long-term goals.

This section offers strategic context and practical guidance for school leaders navigating school choice—whether the program is new, evolving, or already well-established. From compliance and funding oversight to cross-department coordination and community engagement, effective leadership is essential for success.

FACTS supports administrators with tools that simplify decision-making, enhance financial accountability, and ensure program compliance—empowering schools to thrive in a school choice environment without losing sight of sustainability or student experience.



TIP!

What Happens After a School Choice Program Becomes Law

Curious about what goes on after a school choice program is passed? Get an inside look at how these programs are implemented at the state level in this article from ExcelinEd: [How to Implement a Private School Choice Program](#)

Key Responsibilities & Considerations for Administration

- ✓ Determine whether and how to participate in school choice programs.
- ✓ Stay current with legislation and policy changes in your state. (See Risk Management – Compliance)
- ✓ Align participation with your school's mission, vision, and strategic goals. (See Strategic Planning – Align With School Mission)
- ✓ Build and manage a cross-functional school choice team.
- ✓ Ensure compliance with state and program-specific requirements. (See Risk Management – Compliance)
- ✓ Establish financial tracking and reconciliation systems. (See Strategic Planning – Budget & Fiscal Planning and Risk Management – Fiscal Management)
- ✓ Oversee reporting, audits, and accountability measures. (See Risk Management – Compliance)
- ✓ Monitor enrollment trends and adjust your strategy to program timing. (See Strategic Planning – Forecasting & Enrollment Planning)
- ✓ Communicate changes and opportunities to internal and external stakeholders.
- ✓ Engage in advocacy and relationship-building with state and community partners. (See Risk Management – Legislative Monitoring and Strategic Planning – Plan for Volatility)

Administration



TIP!

Know Your State's Landscape

While school choice programs differ across states and even within states, many share common themes: funding sources, compliance requirements, reporting obligations, and increased family mobility. To find out more about the specific programs in your state, you can go to edchoice.org and click on 'Find My State.'



Watch List:

Monitor State Program Details

Monitor State Program Details

- ✓ Program eligibility requirements
- ✓ Program caps
- ✓ Application windows and deadlines
- ✓ Payment timing and mechanisms
- ✓ Compliance and reporting obligations
- ✓ Vendors managing applications or payments; platform access, training & support
- ✓ Allowable use of funds
- ✓ Renewal requirements for schools and families
- ✓ Changes to legislation or program rules



Strategic Planning & Sustainable Growth

School choice participation has financial implications—from new revenue streams to additional operational responsibilities. This section helps school leaders plan strategically for long-term sustainability by forecasting enrollment trends, budgeting for compliance costs, and incorporating funding variability into broader financial models.

Align With School Mission & Capacity

Revisit at key planning intervals or before major growth decisions.

- **Mission alignment**
Annually during strategic planning or board reviews.
- **Facilities & staffing capacity review**
Annually, or before recruiting to grow enrollment.
- **Vision planning**
At least every 2–3 years, or when major funding/policy shifts occur.

Forecast

Update before budgeting season and re-evaluate mid-year or as program rules shift.

- **Estimate participation**
At least annually; update as new application data rolls in.
- **Revenue modeling**
Annually for budget planning; consider quarterly reviews.
- **Scenario planning**
Review 1–2x per year or when legislation or enrollment trends shift.
- **Enrollment forecasting**
Annually, with a check-in mid-year based on admissions data.

Budget & Allocate Resources

Incorporate into your annual budgeting process. Adjust if participation increases or program changes occur.

- **Identify program costs**
Annually, with ad-hoc adjustments if audits or new staffing needs arise.
- **Staffing plans**
Annually; consider a mid-year assessment if workload increases.
- **Tech/service budgeting**
Annually during tech renewal or budgeting season.
- **Cash flow planning**
At least once annually, especially if payments are milestone-based.

Plan for Volatility

Build into annual planning, but monitor regularly for warning signs.

- **Create contingency plans**
Annually, before budgeting season.
- **Monitor legislative changes**
Ongoing; assign someone to track quarterly or in partnership with associations.
- **Withdrawal protocol**
Set once, then review annually or after program changes.

SPOTLIGHT

FACTS Data Insights is a powerful new dashboard feature designed to give administrators a clear, visual overview of key trends—like enrollment patterns, financial forecasting, and demographic breakdowns. By pulling real-time data from our Tuition Management, Financial Aid, Admissions, and Student Information System products, this tool helps you make data-driven decisions to support strategic growth and planning.

Risk Management

Participating in a school choice program can bring significant benefits—but it also introduces new risks that administrators must actively manage. These risks span compliance, financial practices, operations, and even the alignment of school mission and culture. Below are the core categories of risk, along with key considerations and actions you can take to safeguard your school.

Compliance with State Regulations

- **Each state's school choice program comes with its own rules regarding eligibility, reporting, auditing, and use of funds.**

Designate a compliance lead or team to monitor requirements and deadlines.

Stay updated on legislative changes through your state's department of education or school choice agency.

Maintain thorough documentation of student eligibility, use of funds, academic records, and program communication.

Prepare for surprise audits—assume documentation could be requested at any time.

Fiscal Management

- **School choice funding may flow outside of traditional tuition processes, introducing new complexity and potential for mismanagement.**

Ensure proper reconciliation between tuition management systems and choice program funding.

Track all ESA or voucher payments separately and clearly in your financial system.

Plan for variability—choice program enrollment and funding levels can fluctuate from year to year.

Avoid overdependence on school choice dollars in long-term budgeting.

Operational Risk Management

- **Choice programs may impact enrollment flow, staffing, and internal workflows—especially if infrastructure isn't adjusted to match growth.**

Anticipate and plan for enrollment shifts—choice participation may open your school to new families or higher turnover.

Invest in staff training, particularly for admissions, finance, and administrative teams.

Update policies and procedures regularly to reflect how choice participation affects admissions, financial aid, and billing.

Consider technology upgrades to handle increased data tracking and reporting demands.

Mission Risks

- **Expanding access through school choice can diversify your student body, which is a strength—but only if it aligns with your mission and values.**

Revisit your school's mission statement and ensure it aligns with choice participation goals.

Discuss with leadership how school culture and expectations may shift as student demographics evolve.

Be proactive in supporting both existing and new families through the transition—choice should not compromise your community's integrity or identity.

Create communication plans to help all stakeholders understand the purpose, benefits, and boundaries of your school's choice involvement.

SPOTLIGHT

FACTS Enrollment Management Specialists

Partner with a FACTS Enrollment Management Specialist to help your Admissions team integrate your school's mission into every step of the enrollment process—ensuring alignment as school choice brings a more diverse student body.

Leadership Reflection



Print & Collaborate With Your Team

Whether your school, group, or organization is launching a new school choice program or working to strengthen an existing one, this is a key moment to reflect on how effectively your leadership team is navigating the opportunities and responsibilities of participation.

Gather your leadership team to review the FACTS School Readiness Checklist. Then, guide your discussion with the following questions:

What did we learn overall from our readiness score? Which areas are strong, and which areas need attention?

What barriers are keeping us from being fully ready or successful? Are these people resources, products and services, processes, or mindset shifts?

How will we define and measure school choice success for our school, group, or organization?

Managing Growth & Demand

DESIGNED FOR

- ▶ Directors of Admissions, Enrollment Managers, and Registrar Teams

As state-funded school choice programs expand, many private schools experience a surge in inquiries and applications. Admissions teams are now tasked with managing higher demand while ensuring the admissions process remains mission-

driven, efficient, and equitable. Beyond reviewing applications, admissions professionals play a critical role in guiding families, coordinating with internal departments, and using data to support enrollment forecasting and school growth strategy.

Key Responsibilities & Considerations for Admissions

- ✔ Handle increased application volume driven by school choice program participation.
- ✔ Track and report enrollment trends by school choice funding type.
- ✔ Maintain a consistent, mission-aligned admissions process for all applicants.
- ✔ Ensure admissions materials are accessible across languages, literacy levels, and technology access.
- ✔ Coordinate with administration and business office on class sizes, staffing, and tuition policies.
- ✔ Align admissions messaging with marketing and communications efforts.
- ✔ Communicate eligibility requirements, documentation needs, and deadlines clearly to families.
- ✔ Use admissions data to support forecasting, enrollment planning, and retention strategies.
- ✔ Guide families through the school choice application process.



TIP!

Make School Choice Easy to Find

Most families begin their private school search online, so it's essential to clearly highlight your participation in school choice programs on your website. Consider adding program details under the Admissions section, outlining key deadlines in the Tuition & Fees or Tuition Assistance pages, and addressing common questions in your FAQ. Making this information easy to find can boost inquiries, improve the application experience, and build trust with prospective families.

Strategies & Best Practices

School choice programs have transformed the admissions landscape, requiring more than just process efficiency. Schools must now position themselves as accessible, mission-driven options for diverse families entering through state-funded pathways. The following strategies and best practices are designed to help your admissions team proactively manage this shift and turn increased interest into sustainable enrollment growth.

Embed School Choice Awareness into the Full Admissions Journey

- Add a “School Choice at Our School” section to your website, admissions packet, and email drip campaigns.
- Create a visual timeline or checklist specifically for scholarship/ESA applicants.
- Proactively communicate how state funding interacts with internal tuition, deadlines, and steps to secure a seat.

Use Data to Forecast Demand and Plan Proactively

- Track applications by funding source (e.g., ESA, voucher, tax-credit scholarship, private pay).
- Create heat maps using ZIP codes or feeder school data to identify which communities are driving demand.
- Share weekly admissions trends with administration and the business office to inform staffing and section planning.

SPOTLIGHT

Turn Admissions Data into Action

This admissions dashboard gives teams a clear, real-time view of how school choice is influencing enrollment. By analyzing student data by gender, zip code, ethnicity, and denomination, schools can uncover trends, tailor outreach strategies, and collaborate with marketing teams to focus on high-interest areas—ensuring every seat is filled with intention.

Implement Tiered Admissions Review Cycles

- Prioritize review timelines based on funding program windows and award notifications.
- Develop early, regular, and rolling review cycles to align with state disbursement dates.
- Use status tags or categories in your enrollment system to segment families by funding type for easier tracking and outreach.

SPOTLIGHT

Admissions Refresher Trainings

Don't forget to register for our Admissions refresher trainings. This series of 45-minute LIVE webinars is hosted by our FACTS Enrollment Management Specialists who used to work in Admissions offices, just like you!

Prior topics have included:

- Preparing for Enrollment & Updating Packets
- Re-enrollment – Returning Student Process
- Enrollment – New Student Process
- Continuous Enrollment – Steps to Bulk Enroll
- Family Packets & Secondary Packets

Train, Align, and Collaborate Across Departments

- Host cross-functional training sessions between Admissions, Financial Aid, Marketing, and the Business Office each fall and spring.
- Establish a shared intake or inquiry form that flags funding type and tracks family progress from interest to enrollment.
- Ensure all teams use consistent language around school choice to reduce confusion and increase family trust.



TIP!

Stronger Together—Enrollment is a Team Sport

From the business office to marketing to financial aid, successful school choice enrollment takes a coordinated effort. Keep communication flowing across departments so families get clear, consistent messaging—and your school operates like a well-oiled (and well-enrolled) machine.

Coordinate with Marketing to Elevate Family Stories

- Admissions plays a key role in gathering success stories from families who enter through school choice. Collaborate with marketing to showcase these stories in your outreach and tours. See *Marketing & Communications – Leverage Storytelling*

Refine Yield Strategy Based on Funding Type

- Offer provisional acceptance contingent on scholarship approval if program timelines lag behind your admissions deadlines.
- Clearly communicate how long spots can be held and what documentation is needed to confirm enrollment.
- Track yield by funding type and use that data to improve retention strategies and tuition planning.

Establish School Choice Champions

- Designate a “school choice navigator” or liaison within the admissions office to lead implementation and serve as a family point of contact.
- This person can attend webinars, liaise with SGOs or state agencies, and help translate legislative changes into updated internal processes.

SPOTLIGHT

FACTS Email Series Manager

FACTS Email Series Manager automates frequently sent Admissions emails—helping your team stay on top of every step in the enrollment journey. With school choice participation on the rise, you can use this tool to create targeted email series that remind families to start their enrollment, complete school choice documentation, or submit missing application steps tied to funding deadlines. This ensures families stay informed and engaged while reducing manual follow-up for your team.

Admissions & Enrollment

Cross-Departmental Collaboration

Admissions may be the front door, but school choice participation is a team effort—and strong internal collaboration is key to keeping that door open, informed, and mission-aligned. By partnering across departments, admissions can ensure families get consistent messaging, timely updates, and a smooth path from inquiry to enrollment.

Key Collaboration Points:

- **Business Office:**

Confirm tuition rates, fee structures, and school choice billing timelines to communicate clearly with families. Align on disbursement schedules and hold policies for students awaiting funding.

- **Financial Aid:**

Coordinate award letters and funding verification to prevent overfunding and guide families through layered aid options (state-funded + internal aid).

- **Administration:**

Stay informed of seat availability, enrollment caps, and strategic goals related to school growth or demographic shifts.

- **Marketing & Communications:**

Align messaging around eligibility, deadlines, and value proposition for school choice families. Share success stories and ensure admissions materials reflect current offerings.

- **Technology/Data Teams:**

Ensure admissions forms, tags, and CRM tools are capturing funding source data for reporting and forecasting.



Action Steps Checklist



Print & Collaborate With Your Team

School choice success starts with cross-team coordination and intentional planning. This checklist covers practical steps your admissions team can take to streamline processes, support families, and stay ahead of deadlines.

- Align admissions policies with your mission and school choice participation.
- Track inquiries, applications, conversions, and yield by funding type.
- Coordinate with administration/business office on capacity and funding alignment.
- Monitor incomplete or abandoned applications and follow up proactively.
- Set internal review cycles that align with school choice timelines and award dates.
- Use FACTS Data Insights to forecast enrollment trends and inform planning.
- Capture and segment school choice participants in your admissions system.
- Meet regularly with marketing, finance, and financial aid to align messaging and process.
- Ensure your website has a clear "School Choice" page with eligibility and deadlines.
- Share school choice success stories in partnership with marketing.
- Translate all materials and ensure mobile-friendly access for all families.
- Assign a "school choice point person" to stay current on state programs and support families.
- Guide families through external choice applications and automate reminders for deadlines and tasks.

Notes

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Marketing & Communications

Growing Enrollment & Competing Effectively

DESIGNED FOR

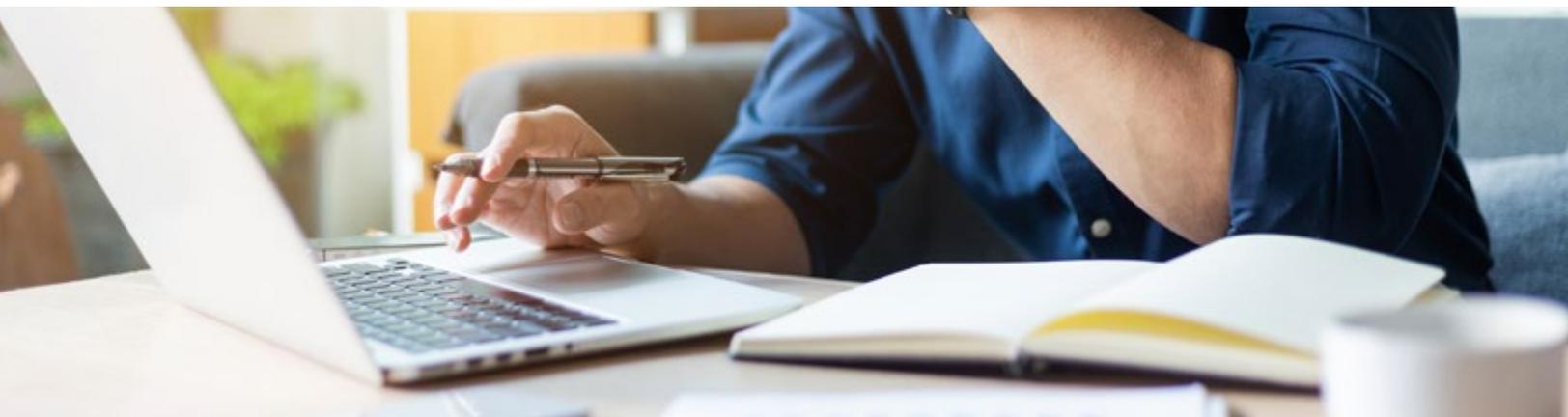
- Marketing Directors, Communications Managers, and Advancement Teams

School choice is reshaping how families evaluate and select schools—making your marketing strategy more critical than ever. With expanded access to private education, families are comparing not just tuition and academics, but also values, community, and support. Your job is to ensure they understand your school's unique story and how school choice programs make it accessible.

Marketing and communications teams must craft compelling, clear, and targeted messaging that explains your value proposition, clarifies eligibility and steps for school choice programs, and connects emotionally with families navigating new options. Strategic marketing builds awareness, drives inquiries, and reinforces the mission at the heart of your school.

Key Responsibilities & Considerations for Marketing & Communications

- ✓ Promoting your school as an accessible and mission-driven option for school choice families.
- ✓ Educating families on eligibility, timelines, and how to apply for funding.
- ✓ Ensuring your brand stands out from other private and public school options.
- ✓ Updating marketing materials to reflect current school choice offerings.
- ✓ Aligning communications across departments to maintain consistency and clarity.
- ✓ Using data to evaluate the effectiveness of messaging and channels.



Strategies & Best Practices

Tailor Messaging for School Choice Families

- Create a dedicated School Choice page on your website with FAQs, eligibility guidelines, and next steps.
- Include testimonials from families who enrolled through ESA, voucher, or tax-credit programs.
- Translate materials and provide mobile-friendly access for families with limited digital access.

Meet Families Where They Are

- Use paid digital ads to target zip codes and demographics eligible for school choice.
- Partner with SGOs, churches, and community centers to distribute materials.
- Host “School Choice Info Nights” webinars and share success stories on social media.

Align with Admissions and Financial Aid

- Ensure all outreach materials match internal processes and funding options.
- Coordinate timelines and messaging to avoid confusion during key application windows.

Cross-Departmental Collaboration

Marketing can't work in a silo. Effective school choice messaging requires coordination with every department that touches the family experience—from application to enrollment.

Key Collaboration Points:

- **Admissions:**
Ensure messaging matches enrollment steps and timelines.
- **Financial Aid:**
Confirm aid language is accurate and up to date.
- **Business Office:**
Align on tuition rates, funding acceptance, and disbursement schedules.
- **Administration:**
Collaborate on messaging related to mission, values, and school growth.

SPOTLIGHT

Do More With FACTS Website Services

Your school website isn't just a marketing tool—it's a launchpad for enrollment. FACTS Website Services is built to seamlessly integrate with FACTS Student Information System and Application & Enrollment tools, so you can turn interest into action without missing a beat.

[Learn more at FACTSmgmt.com/websites](https://FACTSmgmt.com/websites)

Tuition Management & Financial Stability

DESIGNED FOR

- Business Managers, Finance Directors, and Tuition Coordinators

School choice is transforming how families access and pay for private education—and that transformation lands squarely on the desk of the business office. As tuition payments now come from multiple sources—parents, state programs, tax-credit scholarships—the financial landscape has grown more complex and more strategic. Business officers must lead the charge in

establishing systems that not only manage this complexity but also support long-term sustainability. From segmented billing and reconciliation to audit readiness and budget forecasting, your role is critical to turning school choice opportunities into reliable revenue streams that support mission-driven growth.

Key Responsibilities & Considerations for the Business Office

- Managing tuition payments from various sources: parent pay, vouchers, ESAs, tax-credit scholarships, and more.
- Monitoring cash flow cycles based on the disbursement timelines of school choice programs.
- Allocating and reconciling payments by funding source to ensure financial transparency.
- Segmenting tuition accounts and using program-specific billing codes to reduce errors and simplify reporting.
- Generating timely, accurate financial and compliance reports tailored to each school choice program.
- Staying current with state program changes, disbursement policies, and compliance updates.
- Budgeting for fluctuations in enrollment and funding tied to school choice participation.
- Ensuring long-term sustainability by incorporating school choice trends into annual and multi-year financial planning.
- Preparing for state audits and meeting documentation requirements with audit-ready records.
- Supporting families with flexible payment options when funding gaps or delays occur.
- Collaborating with admissions and financial aid to ensure families are billed correctly and consistently.
- Coordinating with technology and data teams to ensure systems capture and track school choice data accurately.

Strategies & Best Practices

School choice participation doesn't just impact the classroom—it reshapes the financial operations that keep your school running. The business office must now handle more than just tuition collection; it must serve as a hub for reconciling public and private payments, ensuring audit compliance, and maintaining long-term financial health. These strategies will help your team adapt confidently and proactively.

Establish Clear Systems for Segmentation and Reconciliation

- Create unique billing codes for each school choice funding stream to ensure accurate tracking.
- Segment tuition accounts by payment source (ESA, voucher, tax-credit, private pay) for clean audit trails.
- Schedule monthly reconciliation checks to match payments to student accounts and state disbursement timelines.

SPOTLIGHT

Use FACTS to Track Every Dollar

FACTS Tuition Management & Billing can be configured to track school choice payments received from the state—by program, by student, and by timing. Ask your Account Management team to help set up the best configuration for your specific state requirements.

Forecast Revenue and Plan for Volatility

- Use historical data from FACTS to project tuition revenue by funding type.
- Update financial models mid-year as enrollment or program rules change.
- Plan for delayed payments by maintaining reserves or flexible budgeting practices.

Strengthen Cross-Department Coordination

- Meet regularly with admissions and financial aid to confirm student eligibility, enrollment status, and funding changes.
- Set shared calendar reminders for school choice deadlines, disbursement cycles, and audit preparation.
- Ensure teams use consistent language and coding for each program to reduce errors and confusion.

Streamline Audit Preparation

- Maintain digital records of all choice-related payments, documentation, and reconciliation logs.
- Align internal reporting systems with the documentation requirements of each state program.
- Run test audits quarterly to catch gaps early and train staff on common red flags.

SPOTLIGHT

Make Advanced Accounting Work for You

Many schools in school choice states use FACTS Advanced Accounting to align school choice payments with their accounting practices. One critical question: Do you track state scholarship funds as a separate line item on your income statement? If so, FACTS recommends setting up a separate institution account to track those dollars accurately. Your Accounting Operations Specialist can guide you through this setup.



TIP!

Introducing Third-Party Payment at Institution

FACTS now offers a "Third-Party Payment at Institution" feature that allows schools to post state or scholarship payments that don't behave like parent payments. This helps ensure funding is accurately tracked without distorting your family billing history. [Contact your Account Manager to get more information on this feature.](#)



TIP!

Know Your Audit Protocol Inside and Out

Audit readiness starts with understanding your state's documentation and reconciliation expectations. Work backward from those requirements to ensure your FACTS setup—whether for tuition, incidental billing, or reporting—aligns with what auditors will expect to see. Many schools are able to meet audit requirements using only FACTS without relying on external spreadsheets or manual documentation.

Support Families with Transparency and Clarity

- Provide itemized statements that show how payments were applied from each source.
- Offer support plans for families waiting on delayed disbursements or facing mid-year changes.
- Ensure billing communications are clear, accessible, and available in multiple languages if needed.

Cross-Departmental Collaboration

School choice funding touches nearly every department—and the business office plays a central role in ensuring it all flows smoothly. From reconciling payments to informing tuition strategy, strong collaboration is essential. The business office should coordinate regularly with admissions, financial aid, administration, and marketing to ensure accuracy, alignment, and a seamless experience for families.

Key Collaboration Points:

● Admissions:

Share enrollment and funding source data to align billing with program participation and ensure timely updates when families withdraw, transfer, or shift funding types.

● Financial Aid:

Confirm award stacking, prevent overfunding, and reconcile state-funded aid with internal scholarships.

● Administration:

Collaborate on budgeting, forecasting, and compliance planning based on school choice participation trends.



TIP!

Incidental Billing for Tracking State Payments

FACTS Incidental Billing isn't just for collecting fees—it's a powerful tool for managing and tracking payments from state programs while also charging families for items not covered by those funds, such as lunch, extended care, or field trips.

Action Steps Checklist



Print & Collaborate With Your Team

Accurate tracking, clear communication, and audit readiness are critical when managing school choice funding at your school. This checklist outlines key steps to help your business office stay compliant, organized, and proactive.

- Configure FACTS Tuition Management to track and report school choice payments with unique billing codes.
- Create a shared reconciliation and audit calendar aligned with disbursement timelines.
- Meet regularly with admissions and financial aid teams to align on enrollment changes and funding eligibility updates.
- Provide clear balance statements to families that show payment source and balances, especially when multiple funding streams are involved.
- Review and update your financial forecast at least annually based on school choice participation levels.
- Prepare for audits by storing all required documentation and payment records within a tuition management system, minimizing reliance on external spreadsheets.
- Stay current on your state's audit protocols and confirm your tuition management system is aligned for compliance.

Notes

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Integrating State Funds with Private Mission

DESIGNED FOR

- ▶ Financial Aid Officers, Tuition Assistance Coordinators, and Scholarship Administrators

The financial aid office now plays a pivotal role in managing the influx of public funds and ensuring that all families—regardless of funding source—are served equitably, compliantly, and compassionately. As school choice expands, financial aid teams

must coordinate internal awards with external dollars, comply with multiple verification processes, and maintain strong family communication to prevent confusion and overfunding.



TIP!

Align Tuition Strategy with Both Affordability and Sustainability

Many private schools charge less than the true cost to educate, relying on fundraising or subsidies to fill the gap. As school choice funds become available, it may be tempting to raise tuition—but be cautious. Rapid increases can create equity concerns and fuel criticism that private schools are becoming less accessible.

Instead, model different tuition and aid scenarios to understand the impact on families and your long-term financial stability. Some schools maintain below-cost tuition and use aid or school choice funds to close the gap; others introduce modest increases with transparency. Even small family contributions can promote engagement without creating barriers.

Key Responsibilities & Considerations for Financial Aid Office

- ✓ Assess family financial need while factoring in state-funded program eligibility.
- ✓ Integrate internal tuition assistance with ESA, voucher, and tax-credit scholarships.
- ✓ Prevent overfunding and ensure total aid does not exceed tuition unless permitted.
- ✓ Verify documentation for compliance with both school and state program rules.
- ✓ Communicate clearly with families about funding options, timelines, and documentation.
- ✓ Collaborate with admissions and business office for award alignment and disbursement accuracy.
- ✓ Track funding trends and completion rates by program to inform enrollment and budget planning.

SPOTLIGHT

FACTS IRS Integration

FACTS offers an IRS Integration feature that allows eligible families to securely pull their tax data directly from the IRS—making the financial aid application process faster, easier, and more accurate. By reducing manual entry and paperwork, this feature saves time for both families and your staff—while improving data accuracy for award decisions.

Strategies & Best Practices

School choice participation doesn't just impact the classroom—it reshapes the financial operations that keep your school running. The business office must now handle more than just tuition collection; it must serve as a hub for reconciling public and private payments, ensuring audit compliance, and maintaining long-term financial health. These strategies will help your team adapt confidently and proactively.

Align Aid Awards with Compliance & Transparency

- Use a standardized rubric for award decisions that includes external and internal funding.
- Set up workflows that pause internal award processing until school choice eligibility is confirmed.
- Track the “stacking” of aid to prevent excess funding and align with state guidelines.

SPOTLIGHT

Take Full Advantage of FACTS Grant Management

If you're using FACTS Financial Aid, you already have access to Grant Management. This powerful feature lets you manage multiple funding sources, apply eligibility filters (like grade or income), allocate awards, and send decision letters—all within the same platform.

Many schools only use the application and reporting features, but Grant Management can save time, reduce errors, and give your aid process a major upgrade. If you're still managing awards in spreadsheets or sending notifications manually, it might be time to explore what Grant Management can do for your process.

Communicate Clearly with Families

- Provide a one-page visual or checklist that shows how school choice and internal aid work together.
- Translate key communications and explain the steps to secure and combine multiple aid types.

Coordinate Across Teams to Ensure Accuracy

- Establish a shared calendar of school choice deadlines, disbursements, and review cycles.
- Hold monthly check-ins with Admissions and Business Office teams to reconcile award lists and funding changes.
- Designate a school choice liaison on your team to attend webinars and flag policy updates.

Cross-Departmental Collaboration

Financial aid doesn't operate in a vacuum—school choice funding touches nearly every corner of the school. Effective coordination with other departments ensures awards are accurate, billing is correct, and families receive consistent guidance. When financial aid teams align closely with admissions, the business office, and administration, it reduces errors, streamlines communication, and helps families feel supported throughout their entire journey—from inquiry to invoice.

Key Collaboration Points:

- **Admissions:**

Confirm school choice participation and award timing before finalizing internal aid packages.

- **Business Office:**

Reconcile aid totals, match payments to billing, and prepare for audit.

- **Administration:**

Share insights on funding trends and forecast shifts in aid demand.

- **Marketing & Communications:**

Ensure external messaging accurately reflects aid opportunities and deadlines.



Readiness Checklist



Instructions

For each category below, rate your school from 1-5:

1 = **Not Started** | 3 = **In Progress** | 5 = **Fully Implemented**

Area of Readiness	1	2	3	4	5	Notes
We understand the funding structure and compliance requirements of our state's school choice program						
Our admission process incorporates school choice eligibility and funding options						
Our business office has a system for tracking and reporting school choice dollars separately from private-pay tuition						
Our financial aid process balances internal aid with external funds effectively						
Our marketing clearly communicates school choice opportunities to prospective families						
We've trained our staff on school choice processes and family communication						
Our leadership team has a strategy in place for integrating school choice into enrollment, financial planning, and long-term growth and risk management strategies						

Total Score / 35

0-14 = Not Started – Begin with foundational understanding and coordination

15-24 = In Progress – Strengthen systems and interdepartmental workflows

25-35 = Ready – Your school is well-positioned to succeed with school choice

Team Details

Owner(s) _____

Target Date _____



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