



COMMUNITY LEADER RESOURCE

Community Leader Briefing Memo

A practical briefing for rabbanim, school boards, federation leaders, communal advocates, and donors preparing for the Federal Scholarship Tax Credit opportunity.



\$1,700 the core donor opportunity

Beginning January 1, 2027, eligible individual taxpayers may be able to claim a Federal Scholarship Tax Credit for certain cash contributions to participating-state SGOs. The public message should be ambitious, simple, and careful: final IRS/Treasury guidance controls.

1 Core purpose

Help Jewish families access scholarships so children can attend the school that best fits their needs.

2 EdGen difference

0% administrative fee: outside support covers operations so qualified contributions go to scholarship awards.

3 Leadership role

Explain the opportunity clearly, avoid overpromising, and help families, schools, and donors prepare responsibly.

Leader takeaway: This is a generational school-choice opportunity, but the trusted posture is disciplined optimism: educate now, prepare now, and clearly separate settled law from pending guidance.



HOW TO EXPLAIN IT

Simple. Accurate. Repeatable

1. What it is

A federal tax-credit scholarship program that encourages private cash contributions to SGOs that award scholarships for eligible K-12 students.

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2. Why it matters

It can unlock new scholarship dollars for Jewish education and help families access the school that is best for their child.

3. What EdGen offers

A national Jewish SGO platform with 0% admin fee, professional operations, family support, school coordination, and donor education.

4. What not to promise

Do not promise eligibility, award amounts, cross-state answers, or donor credit use before final guidance and individual review.

Recommended 30-second explanation

"EdGen is preparing to operate under the new Federal Scholarship Tax Credit program to help Jewish families access scholarships for K-12 education. Donors may be able to receive a federal tax credit for qualified contributions, while EdGen charges 0% administrative fee so scholarship dollars go to students. The program begins in 2027 and final IRS/Treasury guidance will determine many operational details."

Use this language in speeches, board briefings, donor meetings, parent sessions, and school newsletters. Keep the tax details general unless reviewed by counsel and tax professionals.



STAKEHOLDER GUIDE

What Each Audience Needs to Hear

Different audiences have different concerns. The strongest leaders tailor the same core facts to parents, donors, schools, rabbanim, and board members.

Parents

Apply when the portal opens, prepare household and school documents, and watch for state/cross-state guidance. Applying does not guarantee an award.

Donors

The headline is simple: qualified gifts may generate a federal tax credit, subject to tax liability and final guidance. Ask your CPA about your situation.

Schools

Prepare tuition, fee, enrollment, and contact data. Communicate early, but do not promise awards or eligibility before official determinations.

Rabbanim

The opportunity can help families carry the burden of tuition while strengthening schools and preserving educational choice.

Boards

Focus on governance, compliance, operational capacity, donor trust, and clarity. Avoid shortcuts around data security and eligibility verification.

Community advocates

Use FSTC to build broad support for school choice without framing it as government control, voucher politics, or entitlement language.

Phrases to use

"School choice for Jewish families" | "donor-funded scholarships" | "0% admin fee" | "final guidance controls" | "qualified contributions" | "preliminary interest, not an award guarantee"

Phrases to avoid

"Government control" | "voucher politics" | "entitlement language" | "government control" | "voucher politics" | "entitlement language"



LEADER PREP

Common Questions to Answer Carefully

Community leaders should prepare for thoughtful questions. These answers are designed for public settings and should be tightened further after final IRS/Treasury guidance is issued.

Is this a voucher?

No. FSTC is structured around private cash contributions to SGOs and scholarships to eligible students. It is best described as a tax-credit scholarship program.

Can donors designate a student?

No. Public messaging should be clear that donations cannot be earmarked for a particular student. School support may be subject to final rules and EdGen policy.

Who qualifies?

Eligibility depends on statutory requirements, including household income limits and other rules, plus final guidance, state participation, funding, and documentation.

What about cross-state families?

Flag those cases for review. Treasury/IRS guidance may clarify whether eligibility depends on family residence, student residence, school location, or SGO location.

Is the credit guaranteed?

No. Donors need sufficient federal tax liability and should consult their own tax advisors. Program rules and documentation requirements still matter.

Why 0% admin fee?

Because EdGen intends to cover administrative costs externally, allowing 100% of qualified contributions to go to scholarship awards.

Important posture: When an answer depends on rules not yet finalized, say that plainly. Credibility now is worth more than a short-term promise that later needs to be corrected.

NEXT STEPS

What Community Leaders Can Do Now

The most useful leadership posture is active preparation. Leaders do not need to wait passively for final guidance. They can educate, organize, collect interest, and prepare schools and donors for responsible execution.

Leadership checklist

- Identify school contacts and family-facing liaisons.
- Prepare donor education that explains credit vs. deduction.
- Build a preliminary interest list for families, donors, and schools.
- Set internal guardrails around claims, eligibility, and award promises.
- Coordinate with tax advisors, legal counsel, and data-security vendors.
- Schedule post-guidance briefings once Treasury/IRS rules are released.
- Keep public materials current with a last-updated date.

Suggested timeline

- **Now**
Educate leaders, build website resources, prepare school and donor lists.
- **Pre-guidance**
Collect interest forms and prepare materials with clear caveats.
- **After guidance**
Update FAQs, eligibility logic, school onboarding, and donor receipts.
- **Launch season**
Open applications, donor giving, school coordination, and support channels.
- **Annual cycle**
Report impact, update resources, and prepare the next campaign.

Communal alignment

EdGen can be positioned as a practical bridge among families, schools, donors, and national Jewish organizations, while maintaining compliance discipline and respect for final federal guidance.