



SCHOOL PARTICIPATION PACKET

Helping Schools Prepare for FSTC Scholarships

A practical onboarding packet for Jewish schools preparing to coordinate family applications, enrollment verification, tuition data, and scholarship award administration through EdGen.

0%

0% admin fee. 100% scholarship impact.

EdGen does not charge an administrative fee on qualified contributions. Administrative costs and overhead are covered externally, so donor funds can be directed to scholarship awards for eligible students.

What this packet helps schools do

1 Register

Prepare school data, contacts, tuition schedules, and participation materials.

2 Coordinate

Help families understand the application process without overpromising awards.

3 Verify

Confirm enrollment, grade, tuition, fees, and other school-related facts.

4 Report

Support EdGen recordkeeping, communication, and final compliance requirements.



Important: This packet is built for planning and school readiness. Final Treasury/IRS guidance, participating-state rules, and EdGen listing requirements will control actual operations.



STEP 1

School Onboarding: What EdGen Will Need

Schools should prepare a clean, reliable profile so EdGen can coordinate parent applications, school participation, and scholarship award processing efficiently.

School profile information

- Legal school name and any DBA name
- School address, phone, website, and EIN if needed
- Primary FSTC contact and backup contact
- Grades served and grade configuration
- Gender divisions, campuses, or school branches
- Current tuition schedule and required fees
- Anticipated 2027-2028 tuition and fee schedule
- Banking/disbursement contact, when requested
- School calendar and key application deadlines

Family coordination information

- Parent-facing contact person for questions
- How the school wants families notified
- Enrollment verification workflow
- Current school year grade and next year grade fields
- School attending next year field
- Parent residency state and school state notes
- Tuition assistance office coordination, if applicable
- Language preferences for family communications
- Escalation process for unusual family situations

School tip: Assign one internal FSTC owner. Parent questions, tuition data, application reminders, and enrollment verification should not be spread across five different offices.



STEP 2

How the Family Application Workflow Should Run

The school should make the process feel simple for parents while letting EdGen handle eligibility review.



School communication guardrails

Do say

- Applications may be reviewed for preliminary eligibility.
- Scholarships depend on funding and final rules.
- Parents should submit complete and accurate information.
- EdGen will provide updates as guidance develops.

Do not say

- Do not promise a scholarship before eligibility is confirmed.
- Do not guarantee cross-state eligibility until final guidance is clear.
- Do not tell donors they can support a specific student.
- Do not give tax advice to donors or families.

Required fees	School	May be part of eligible K-12 education expense review, subject to final guidance.
Scholarship recipient grade	Family + school	Must match student application and enrollment verification.
Current year and next year grade	Family + school	Supports applications for 2026-2027 and 2027-2028 planning.
School attending next year	Family + school	Needed for award routing and school-state questions.
Enrollment status	School	Prevents awards for students who are not actually enrolled or attending.
Prior scholarship or sibling status	EdGen + family	Supports statutory priority rules for renewal and sibling cases.

Qualified expense caution

Section 25F ties qualified elementary or secondary education expenses to expenses described in Section 530(b)(3)(A). Schools should not assume every school charge is automatically eligible until final federal guidance and EdGen policy confirm treatment.

Operational takeaway: keep tuition, mandatory fees, optional fees, tutoring, services, supplies, and transportation categories separate in your internal data.



STEP 4

Compliance Points Schools Should Understand

EdGen will handle SGO compliance, but schools should understand the rules that shape parent communication, donor expectations, and scholarship administration.

1 10+ students, not all one school

SGOs must provide scholarships to 10 or more students who do not all attend the same school.

2 90% scholarship spend requirement

SGOs must spend not less than 90% of income on scholarships for eligible students. EdGen plans 0% admin fee on qualified contributions.

3 Eligible student verification

SGOs must verify annual household income and family size to ensure the student meets income eligibility requirements.

4 Priority rules

Priority is required for prior-year scholarship recipients, then siblings of students who received a scholarship from the SGO.

5 No student earmarking

SGOs may not earmark or set aside contributions for scholarships on behalf of any particular student.

6 State listing required

A participating state must provide an SGO list to the IRS for a donor to donate to an SGO within that state and claim the credit.

Source note

These school-facing compliance points are drawn from 26 U.S.C. Section 25F and the IRS Federal Scholarship Tax Credit page. This packet does not replace final Treasury/IRS guidance, state rules, EdGen policies, or legal counsel.



STEP 5

School Readiness Checklist

Use this checklist before inviting families to apply. A school that prepares early will be easier for parents to navigate and easier for EdGen to support.

Before launch

- Name one school FSTC owner and one backup contact.
- Prepare legal school name, address, grades served, and contacts.
- Prepare 2026-2027 and 2027-2028 tuition/fee schedules.
- Decide how families will be notified about EdGen applications.
- Prepare parent FAQ and application checklist links.
- Confirm internal process for enrollment verification requests.
- Create a list of likely eligible families, if appropriate and privacy-compliant.
- Coordinate with tuition assistance office and business office.
- Prepare disclaimers: no award is guaranteed.
- Track questions that require final Treasury/IRS guidance.

Suggested timeline

- Now**
Prepare school data and identify internal owner.
- Spring/Summer 2026**
Review guidance and update parent materials.
- Fall 2026**
Educate families and collect interest forms.
- Early 2027**
Coordinate applications, verification, and award processes.
- Ongoing**
Review reports, eligibility updates, and school communications.



Recommended next step

Schools should complete an EdGen school interest form and assign a staff member to coordinate with EdGen on application rollout, tuition data, enrollment verification, and family communications.