

Intentional **AWARDING:** *Disbursement via 529s*



Awarding Not Working?

- Your disbursement process is an administrative nightmare. It's a chaotic system that relies on ad hoc, inconsistent solutions that drain your team's time and energy.
- You're worried about negative scholarship displacement. Your funds are displacing other financial aid, preventing your scholars from receiving the full benefit of resources available to them.
- Your scholars can't consistently access their scholarship funding. The process is difficult, they're confused, and they're having negative experiences.
- You can't guarantee donor dollars are used as intended. You're concerned that many awards are acting as grants to institutions, putting your program out of compliance with donor agreements.

Students First Consulting: The Scholarship Experts

We're the only consulting firm focused exclusively on scholarships. It's what we do day in, day out. Our solutions are strategic, student-centric, and designed to transform your program.

With over 34 years' combined experience, our team has helped over 50 client organizations. We work in partnership with clients to co-design a program that delivers the impact they want. This collaborative approach is how we achieve tangible results that are both effective and sustainable.

SFC and 529s

- We've spent years researching providers' needs and the viability of this approach.
- We've implemented 529s for numerous clients, including providers of all types and sizes.
- We're the go-to experts on awarding scholarships through 529s.



Paying Scholarship Awards via 529s

Implementing the 529 Solution at Your Organization

This service is for organizations that want to use 529s for scholarship disbursements. Our team provides a highly structured, consultant-led approach from kickoff to making your first tranches of payments to scholars. Our package includes supporting you in:

- Managing the entire implementation process, from building a customized workplan to providing strategic direction at every key decision point.
- Choosing the best 529 plan provider to fit your organization's specific needs and goals.
- Adapting your existing policies and procedures, ensuring a seamless integration with your new 529 approach.
- Developing clear, concise communications for your staff, students, and other important stakeholders like donors and fundholders.
- Customized training to ensure your team and students understand the new disbursement methods and their benefits.
- Evaluating the success of your early efforts and noting areas for ongoing improvement.

The typical engagement timeline is 4-6 months, with pricing dependent on your program size and your specific needs.

Core Outcomes

- A drastic reduction in time spent on disbursement administration. We streamline your processes, giving your team their time back.
- Strong oversight of funds and usage in alignment with donor intent. You can ensure every dollar is used as intended.
- Mitigated displacement, with scholars able to use every dollar offered to them. Your scholarships won't replace other financial aid.
- Increased student satisfaction and empowerment. A smoother, more reliable process leads to a positive student experience.

What Our Clients Say

“*I'm amazed at how easy this is...and 100% of our scholars are satisfied. So much better than before!*”



St David's
FOUNDATION

Ready to Award Differently?

We're ready to help you start. Contact us today for a conversation about your needs and how we can support you.



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*Schedule a Free
30-Minute Consultation*

