

Financial Aid Decision and Distribution Worksheet

A five-bucket framework for distributing limited aid honestly, consistently, and in direct service of the school's mission.

For every family who receives financial aid and does not need it, there is a family who needs it and does not receive it. Financial aid must therefore be mission-appropriate, financially responsible, and honest.

01 Mission access

Families whose enrollment directly advances the school's mission and who cannot attend without assistance.

02 Enrollment strategy

Mission-fit students who strengthen an under-enrolled grade or program while producing responsible net tuition revenue.

03 Retention and hardship

Currently enrolled families experiencing a documented change that threatens continuity.

04 Employee children

A clearly governed employment benefit applied consistently and accounted for transparently.

05 Special circumstances

Limited, documented cases requiring authorized judgment outside ordinary awards.

Policy controls

- ☐ Written eligibility and documentation standards
- ☐ Authorized decision-makers and conflict-of-interest practice
- ☐ Total aid budget and grade-level concentration limits
- ☐ Consistent renewal and appeal process
- ☐ Separation of financial aid from unrecorded discounts
- ☐ Measurement of yield, retention, unmet need, and net tuition

Award review record

Use the same questions for every family while preserving appropriate confidentiality and documented judgment.

Family or confidential reference

Aid bucket and mission rationale

Documented financial need

Enrollment or retention consequence

Proposed award and resulting net tuition

Decision-maker and approval date

Portfolio review

Budget available / committed / remaining

Awards by bucket and grade

Families with verified unmet need

Awards requiring renewal review

Policy exception and reason

This worksheet supports consistent governance; it does not replace qualified legal, tax, employment, or financial counsel.