

Arete Scholars streamlines decision making and reporting for state and tax compliance

Powered by VenturEd Solutions' TADS® Financial Aid, Arete Scholars continues their mission to advance the realization of excellence in underserved and marginalized children by opening the doors to opportunity through scholarships.

“Every year TADS Financial Aid saves us money and keeps us from having to hire seasonal bookkeepers. If we had to review every application, and make sure every document was there, that would be cumbersome and cost us in time and money.

— Marilyn Hicks, Vice-President of Operations, Arete Scholars

Georgia-based, Arete Scholars program is funded through the Georgia Tax Credit Scholarship Program. Since 2010, businesses, foundations, and people across Georgia have helped Arete Scholars award more than 18,000 K-12 scholarships nationally, worth nearly \$87 million. The scholarship amount can range up to \$4000.00 per student scholar. Through its programs this innovative scholarship program empowers economically disadvantaged families to choose the best learning environment for their children in over 120 schools.

Marilyn Hicks, Vice-President of Operations, has been in her role for fourteen years, and oversees the scholarship initiatives process. For over a decade TADS® has served their financial aid scholarship needs and continued growth initiatives. In her role, she oversees Arete Scholars' expanding scholarship program and ensures state and tax compliant reporting to maintain the scholarship foundation's efficacy.

“Every year, I gather comprehensive financial data for each student family, including household size, Adjusted Gross Income (AGI), and other financial information,” explains Hicks. “This data is provided to the state each year for them to understand the clients we serve.”

Previously, submitting this data for scholarship compliance was a cumbersome and time-consuming task. By using TADS, Arete Scholars has simplified data reporting management and ensured continued efficacy of the reporting requirements. “TADS reporting features are so valuable to our program and ensuring we are in compliance with spending the state tax voucher monies appropriately and presenting the student and family data with absolute accuracy,” said Hicks.

Accurate financial data reporting gets funds to schools quickly

Additionally, Arete Scholars (Georgia), to disburse scholarship funds to its participating schools, is required to submit student enrollment data on a quarterly basis to the state. Hicks turned to the TADS support team for help in refining this process.

The TADS team custom-designed an intuitive user-friendly form that all Arete Scholars member schools can easily access and utilize for enrollment verification. This functionality offers a dual benefit. Arete Scholars can efficiently track student enrollment and ensure funds are allocated appropriately. Schools gain and share effortless, privacy compliant access to data for verification purposes.

Hicks notes, "The form TADS created for us made it much easier for our schools, in that all our schools can just login and utilize this form to send in student data. We currently have over 120 active schools in Georgia, so being able to verify student numbers and send those checks to schools to continue the support of the student, is hugely important."

TADS customization simplified the process for both Arete Scholars and schools. This streamlined quarterly reporting allows Arete Scholars to focus on their core mission: supporting students through their financial aid program.

Empowering fair and unbiased financial aid awarding

Financial aid verification is a crucial step in ensuring fair and unbiased financial aid distribution. Schools and foundations understand the importance of building trust with families by demonstrating transparency and efficiency in the verification process.

Hicks explains, "A great benefit to TADS is that it gives us the ability to tell families that we have a third party verifying all their submitted family income information. TADS makes our work a lot easier because you all do all the processing of the applications, and we can then take that data and make our decisions quickly."

TADS' independent verification provides a layer of neutrality, letting schools ensure families that their financial aid eligibility is determined based on accurate information, free from any internal bias. Automating much of the processing, TADS ensures schools and foundations can make financial aid decisions more quickly, reducing uncertainty for families and allowing them to make informed school choices sooner.



TADS support created a functionality for us that works and makes it easy to do what we do for verifying students. Our accreditation counts on this reporting to the state to be accurate and timely.

Marilyn Hicks
Vice-President of Operations
Arete Schollars



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