



Discover What Goes into Making your ESA, Microgrant, or Tax Credit Program Successful

Tips from the industry's most trusted partner.

What goes into a successful program implementation?

Executing a seamless, fraud-resistant program requires a well-thought-out application, claim submission, and review processes, as well as comprehensive resources and transparent administrator dashboards.

Here are Merit's top tips for success

✔ Get Fast & Accurate Eligibility Checks

CONSIDERATIONS

To reduce the risk of fraud, program applicants need to be fully qualified. The application needs to balance being simple to complete, yet detailed to validate eligibility. Verifying eligibility can easily add hundreds of thousands of dollars to the cost of your program without automations and direct qualifications.

HOW MERIT CAN HELP

Merit reduces application effort and review time by automating eligibility checks by connecting with other state agencies or existing programs to verify information.

✔ Leverage Custom Program Implementation & Management Expertise

CONSIDERATIONS

Defining program guidelines and processes ensures the program is centered on students' needs while limiting the possibility of fraud or the misuse of funds. Without a third-party partner, developing mobile applications, publishing content, and reviewing claims can require 5-20 full-time employees, depending on the size of your program.

HOW MERIT CAN HELP

Merit provides tools for submitting and reviewing reimbursement claims, as well as produces guidebooks and training materials for parents, businesses, and partner agencies.

✔ Set Up an Online Marketplace with Qualified Education Service Providers

CONSIDERATIONS

Implementing an ESA or other customized educational program involves creating a curated marketplace that offers preapproved education providers that parents and guardians can browse. Outside of the marketplace development effort, it can take hours of outreach, application review and qualification, and onboarding for each service provider, requiring the equivalent of one or more full-time employees dedicated to the Marketplace.

HOW MERIT CAN HELP

Merit conducts targeted outreach programs to local education service providers and nationwide vendors, and equips those businesses with toolkits to promote the program to their customers.

✔ Go With Professional, Local Marketing & Outreach

CONSIDERATIONS

Bringing awareness to qualifying families and education service providers ensures participants can take advantage of the program fully. Count on dedicating at least a six-figure budget to marketing campaigns, especially for new or changed programs.

HOW MERIT CAN HELP

Merit executes hyper-local, multi-channel campaigns to drive program awareness and engagement.

✔ Ensure Access for Everyone

CONSIDERATIONS

Underserved populations and individuals with language barriers need to be catered to as well in order to truly deliver on the spirit of these programs. Translation services and accessibility tools, while seemingly nominal, take thousands of dollars and many hours to do right.

HOW MERIT CAN HELP

Merit builds materials with multi-language support, as well as provides accessibility tools for those with visual or auditory impairments.

✔ Focus on Customer Support for Client Success

CONSIDERATIONS

Families often require support during the application process, when purchasing from service providers, or when requesting reimbursements. Hiring, training, and managing service agents to respond to applicants and participants can add hundreds of thousands of dollars over the lifetime of the program.

HOW MERIT CAN HELP

In addition to online help centers, tutorial videos, and other resources, Merit takes on all customer support with a US-based multilingual support team.

✔ Access Insightful Dashboards

CONSIDERATIONS

Real-time reporting highlighting applicant and participant numbers, claims data, approval times, and more will provide insights into your program's performance and helps identify areas for improvement. Save hours every week and maintain accountability by having data available at your fingertips.

HOW MERIT CAN HELP

Merit builds custom, exportable dashboards with your required metrics so that you can track the program numbers you care about in a self-serve fashion.

✔ Use Verification Protocols & Guarantees

CONSIDERATIONS

Misuse of funds is a top concern, but zero state or public dollars should be used to compensate for bad actors abusing the program. Some programs have made headlines recently due to potential misuse of millions of dollars in funds.

HOW MERIT CAN HELP

Merit's No-Fraud-Guarantee will cover any legitimate fraud-related costs, should they occur, giving peace of mind and assurances for program success.

✔ Don't Forget Security & Compliance

CONSIDERATIONS

Participant information can include financial data, information about minors, and other personally identifiable information (PII). Any internal or external administrator needs to have compliance officers, trainings, and external auditing that can cost hundreds of thousands of dollars if not already implemented.

HOW MERIT CAN HELP

With Merit, data is always secure due to SSAE 18 SOC 2, HIPAA, FERPA, NIST, and WCAG 2.0 compliance, external audits, and regular employee training.

Ready to build your own program?

Use Merit's configurable Strategy Guide to design your ideal program. Once complete, you'll receive a PDF copy of your workbook. Visit merits.com/esa-workbook to get started.