

# Financial Aid Conversation Evaluation Checklist

Recruiter Name: \_\_\_\_\_

Supervisor: \_\_\_\_\_

Date: \_\_\_\_\_

## Rating Scale:

1 = Needs Significant Improvement

3 = Meets Expectations

5 = Exceeds Expectations

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## WHO: Are the Right People Engaged?

- Identifies and intentionally includes parent(s)/guardian(s) in financial aid conversations
- Clearly shifts language when speaking to parents vs. students
- Initiates timely follow-up after award letter delivery (within 2–5 days)
- Follows up as necessary (if no response, or no action)
- Builds rapport and trust with both student and family

Score (1–5): \_\_\_\_\_

Supervisor Notes:

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## WHAT: Is the Offer Clearly Explained?

- Accurately breaks down scholarships, grants, loans, and their conditions
- Distinguishes between gift aid and repayable aid
- Explains loan options clearly (full vs. partial borrowing, repayment basics)
- Addresses total out-of-pocket cost per year
- Provides guidance for additional aid sources (i.e. state aid, external scholarships)
- Answers questions confidently without unnecessary handoffs to Financial Aid

Score (1–5): \_\_\_\_\_

Supervisor Notes:

**HOW: Are Next Steps Clear and Manageable?**

- Breaks the financial process into simple, sequential steps
- Avoids overwhelming families with too much information at once
- Clearly explains required actions (FAFSA, state aid, loan paperwork, deposits)
- Provides or directs families to necessary forms and links
- Confirms understanding before moving to the next step
- Follows up with students/families who stall or get “stuck”

**Score (1–5):** \_\_\_\_\_

**Supervisor Notes:**

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**WHEN: Is Urgency and Momentum Created?**

- Clearly communicates timelines and deadlines
- Explains benefits of acting sooner rather than later
- Connects aid confirmation to next enrollment steps (deposit, housing, registration)
- Sets specific, achievable next-step timelines (e.g., “by next Friday”)
- Maintains forward momentum without creating pressure or confusion

**Score (1–5):** \_\_\_\_\_

**Supervisor Notes:**

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**WHY: Is the Value Proposition Compelling?**

- Articulates why the institution is worth the investment
- Connects financial investment to specific outcomes
- Tailors the value story to the student’s goals and interests
- Helps families see the long-term return on investment
- Celebrates commitment and affirms the family’s decision when it occurs

**Score (1–5):** \_\_\_\_\_

**Supervisor Notes:**

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**OVERALL ASSESSMENT**

- Demonstrates confidence and clarity in financial aid conversations
- Approaches the conversation with a “teacher’s heart”
- Builds trust through transparency and consistency
- Maintains ownership of the recruitment journey through the aid decision

**Overall Score (Average):** \_\_\_\_\_ / 5

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**DEVELOPMENT & COACHING PLAN**

**Top Strengths:**

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**Areas for Improvement:**

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**Action Steps / Training Needed:**

- Financial aid fundamentals refresher
- Role-play practice
- Shadowing a high-performing recruiter
- Call/visit observation
- Other: \_\_\_\_\_

**Supervisor Signature:** \_\_\_\_\_

**Recruiter Signature:** \_\_\_\_\_