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CAREER PATTERNS OF FINANCIAL AID DIRECTORS

Clarence L. Casazza

Since 1958 and the National Defense Education Act, the volume of money reaching institutions of higher education through an ever growing variety of programs termed "student financial aids" has increased phenomenally. This growth has been reflected in the fact that most colleges and universities have by now largely centralized the administration of such programs under the supervision of a financial aids director. During the past ten years financial aids administration has emerged as a specialized, complex, and distinct administrative function in higher education. The financial aids administrator now plays a crucial role in implementation of a national goal, the removal of economic barriers to education so that each individual will have an opportunity to develop his abilities without regard to his family's financial resources.

Because of the relatively rapid development of this professional administrative role in higher education, very little is known about the persons who are financial aids directors. Of course, the appearance of this administrative role is just one example of the growth of the administrative component of most institutions of higher education. Little research has been done regarding the backgrounds and the characteristics of individuals who hold various administrative positions in higher education, especially at the middle level.



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In order to gather recent information regarding the career progression and aspirations of financial aids directors, a questionnaire was sent in the spring of 1970 to the financial aids directors at the 179 colleges and universities in the United States with reported enrollments of 10,000 students or more.¹ The financial aids directors in these larger institutions were chosen as subjects since it is in such institutions that these individuals are most likely to be full time, specialized professionals responsible for comprehensive programs of student financial assistance. Large institutions are also most likely to have large administrative structures composed of many layers of administrators.

Usable responses were received from 131 individuals (73.2 per cent of the sample) and their responses are included in this study.² The great majority of the respondents, 86.3 per cent, were employed by publicly controlled institutions. In addition, most of the respondents, 71.0 per cent, were employed by universities, with 17.0 per cent employed by four-year colleges, and 12.0 per cent working in two-year colleges.

EDUCATIONAL CAREERS

As might be expected, all respondents had received bachelor's degrees. However, less than one third of these individuals, 30.6 per cent, had chosen education subject areas as their major fields of study at that point in their careers. The actual breakdown of undergraduate major fields of study for these directors of financial aids appears below. As can be seen, these individuals represent a wide variety of undergraduate fields of study.

Field of Study	Per Cent of Respondents
Education	30.6
Social Sciences	25.0
Business and Economics	23.4
English, Journalism, Radio-TV	8.1
Mathematics, Sciences, Engineering	7.3
Fine Arts, Humanities	5.6

Nearly three fourths of these financial aids directors, 71.8 per cent, had earned master's degrees, with an additional 14.5 per cent indicating enrollment or plans to enroll in the near future in master's degree programs. At this level of study most respondents selected fields in education as their major subject areas. Of those holding master's degrees, 64.9 per cent had majored in some field of education. From these findings it may be concluded that a master's degree is coming to be a prerequisite for becoming a financial aids director, at least at larger colleges and universities.

Over one fourth of these financial aids directors, 26.0 per cent, either had already received doctoral degrees or were actively enrolled in such programs. Of those holding doctoral degrees, 82.3 per cent had majored in education fields, and 70.6 per cent were over 35 years old when they received these degrees.

There appeared to be a definite relationship between institutional attendance and employment. Over one half of all respondents, 52.7 per cent, reported having been employed at some point in their careers by institutions from which they had earned degrees. Over one third, 42.0 per cent, reported that they were currently employed by institutions from which at least one degree had been earned.

EMPLOYMENT CAREERS

These directors of financial aids were asked to give detailed information regarding all full time positions they had held since receiving their bachelor's degree. Less than one half, 42.0 per cent, had spent their entire employment careers in education, and only 17.6 per cent had spent their entire employment careers in higher education. The proportions of these financial aids directors with work experience in fields other than higher education are shown below. These findings indicate that financial aids directors have come to their positions from a wide range of work experiences.

Employment Field	Per Cent of Respondents
Elementary or Secondary Education	39.8
Military Service	29.8
Business	26.1
Government	14.5
Social Service	3.1
Ministry	2.3

Well over one half of all respondents, 60.3 percent, reported that they had not even considered careers in higher education administration until they had first been employed in these other fields of endeavor. Most respondents, 59.5 per cent, did not begin employment in higher education administration until after the age of 30, and 30.0 per cent were over 40 years old when they accepted their first such positions.

Nearly one half of these financial aids directors, 48.1 per cent, began employment in higher education in fields other than financial aids, and moved to financial aids at some later point in their careers. For over one third, 38.2 per cent, their positions as financial aids directors were also their first administrative positions in higher education. These findings may be a result of the newness of the financial aids field and the need for an institution to move an individual from some other position into financial aids as these activities were centralized in one office.

A surprisingly large proportion of these individuals, 39.7 per cent, were not employed in higher education immediately prior to assuming their positions as directors of financial aids. It is disturbing that only 19.8 per cent came to their positions as directors of financial aids directly from other positions in financial aids. Another disturbing finding was that over two thirds of all respondents, 67.9 per cent, reported having had no experience at all in fi-

nancial aids administration prior to assuming their positions as directors of financial aids. This lack of experience in financial aids prior to becoming director certainly is unfortunate, but may be due to the rapid growth of the field and the resultant need for a large influx of people into financial aids administration. As the supply of assistant directors and financial aids counselors increases, the need to hire an inexperienced and untrained person as financial aids director should decline. Another encouraging development has been the inclusion of financial aids study in many master's degree programs in student personnel work, and recent emphasis on training within the state, regional, and national financial aids associations.

In this light it is interesting that twice as large a proportion of the older respondents than of the younger respondents reported having had no prior experience in financial aids administration. Of the financial aids directors under 43 years of age, the median age, 40.3 per cent reported having had experience in financial aids before assuming their positions as directors. On the other hand, only 18.8 per cent of the respondents aged 43 and over reported such prior experience. Thus, it appears that a trend may be developing whereby the larger colleges are hiring experienced financial aids officers as directors of financial aids where once they transferred people from other administrative positions or looked outside higher education to fill these positions.

CURRENT STATUS

The great majority of the respondents, 92.9 per cent, had titles such as Director of Financial Aids or equivalent titles. Slightly less than one fourth of the respondents, 24.7 per cent, stated that they regularly performed administrative duties in areas other than financial aids. Most of the respondents had held their positions for a relatively short period of time. As can be seen below, 19.8 per cent had held these positions for one year or less, and only 25.2 per cent had been director of financial aids for more than five years.

Number of Years in the Position	Per Cent of Respondents
1 year or less	19.8
2 - 5 years	55.0
6 - 10 years	16.0
11 or more years	9.2

Over three fourths of all respondents, 79.4 per cent, were administratively located in the student personnel services divisions of their respective institutions. The remainder were distributed among other administrative divisions, primarily academic affairs or business services.

Nearly half of the respondents, 46.5 per cent, reported having zero or only one administrative position between themselves and their respective presidents, with 42.8 per cent reporting to vice-presidents and 3.7 per cent reporting to presidents or assistants to presidents. An additional 40.5 per cent reported only two administrators between themselves and their presidents. So,

while nearly half of these financial aids directors found themselves situated fairly high in the administrative hierarchies of their institutions, it was disappointing that less than half reported to top level institutional administrators. The magnitude and impact of financial aids programs at these large institutions would seem to merit top level attention. Also, the financial aids director should have a direct channel of communication into top level decision making.

CAREER PLANS

It was assumed that, because of the newness of the field, it would be difficult to predict what positions these respondents might hold in the future by looking at the positions taken by their immediate predecessors. The findings confirmed this assumption. It is interesting that 31.3 per cent of these individuals had no predecessor in the position, and an additional 13.7 per cent had predecessors who did not remain employed (retired, died, entered graduate school). Thus, only 55.0 per cent of the respondents had predecessors who left their respective directorships for other positions. Over two thirds of this group, 68.1 per cent, remained in higher education. However, they moved to a wide variety of positions showing no particular pattern of progression. Those predecessors leaving higher education for other fields moved to a variety of positions in business, government, and other levels of education.

When asked to rate their own chances for advancement within their institutions, over two thirds of the respondents, 68.7 per cent, indicated that these chances were very good or acceptable. Over three fourths of the respondents thought it likely, or at least possible, that a financial aids director could advance to positions as director of student services or chief student personnel officer at their respective institutions. Other positions rated as likely or possible advancements by over one half of the respondents were assistant to the president, chief development officer, and chief business officer. The respondents considered the positions of chief academic officer and president as highly unlikely advancement possibilities.

In looking toward the future, these financial aids directors expressed somewhat inconsistent views of their positions. Virtually all of the respondents, 95.6 per cent, agreed that experience in financial aids administration was good preparation for other administrative positions in higher education. On the other hand, nearly the same proportion, 86.3 per cent, felt that financial aids administration, in itself, offered sufficient challenge and reward to be considered as a lifelong career alternative. While somewhat inconsistent, these findings may indicate that though they would consider remaining in financial aids work indefinitely, these individuals thought they were obtaining experience useful for advancement purposes.

This assumption seems to be justified by the fact that 44.3 per cent of the respondents indicated plans to remain in their positions as financial aids directors indefinitely or until retirement. Many of these said they would not

actively seek another position but might move if a good opportunity arose. When asked what positions they would like to hold in the future, only three positions were mentioned by more than one third of the respondents. A desire to be chief student personnel officer was indicated by 42.0 per cent; 37.4 per cent were interested in becoming directors of student services; and 36.6 per cent thought they would like to hold positions as assistant to a president. In all, these individuals expressed an interest in over twenty different positions in higher education. Only 9.2 per cent expected to leave higher education for their next positions.

When asked to look ahead to the positions they might like to be holding at retirement, the largest proportion of respondents, 35.9 per cent, stated that they expected to remain in financial aids until retirement. Nearly one third of these financial aids directors, 31.4 per cent, aspired to reach what might be called top management positions before they retired: president, vice-president, or assistant to a president.

The younger financial aids directors, those under the sample's median age of 43 years, were more optimistic and more ambitious regarding financial aids officers' chances of advancing to other administrative positions. Most of the younger individuals, 54.8 per cent, indicated plans to move to other administrative positions in higher education. Most of the older individuals, 59.4 per cent, expected to remain in financial aids work indefinitely or until retirement.

As might be expected, those financial aids directors either holding doctoral degrees or enrolled in such degree programs, 26.0 per cent of the respondents, had more interest in advancing to other positions in higher education than did the non-doctoral respondents. Well over one half of this doctoral group, 58.8 per cent, expected to move to other administrative positions in higher education while only 32.3 per cent expected to remain in financial aids indefinitely or until retirement. On the other hand, 63.9 per cent of the non-doctoral group expected to remain in financial aids work indefinitely or until retirement, while only 37.1 per cent expected to move to other administrative positions in higher education. Nearly one fourth of the doctoral respondents, 23.5 per cent, hoped to retire as college presidents while only 1.0 per cent of the non-doctoral group expressed such a hope.

CONCLUSIONS

This study has provided needed career information regarding financial aids directors, one type of middle-level administrator in higher education. These financial aids directors did not seem to have consciously directed their careers specifically towards financial aids work or even towards higher education administration generally. They came from a wide variety of educational backgrounds, they worked in other fields prior to taking administrative positions in higher education, and they did not even consider careers in higher education until they had been employed in other fields of endeavor. Finally,

they became directors of financial aids without having had prior experience in the field.

Regarding the future, these financial aids directors felt strongly that they were acquiring experience that was good preparation for other administrative positions in higher education, and they expressed some interest in advancing to other administrative positions in higher education. However, their actual plans were vague, with less than half of these individuals, 42.7 per cent, indicating specific expectations of moving to other administrative positions in higher education. Those indicating such plans showed no particular pattern in their aspirations.

The findings of this study seem to have implications for financial aids administration specifically and for higher education administration generally. First of all, since financial aids administration has recently developed into a specialized professional, or near professional, field with a great institutional and social impact, colleges and universities must give more thought to the recruitment and training of the individuals responsible for these programs. In addition, sufficient rewards and opportunities for advancement must be provided if competent individuals are to be recruited and retained without a stifling of their aspirations. The abilities and knowledge needed in financial aids administration are such that colleges and universities can no longer afford to hire inexperienced individuals as financial aids directors.

As our institutions of higher education assumed more functions in our society and rapidly increased in size, and in the scope of their activities, they necessarily developed larger and larger administrative structures. The financial aids director is now one of many middle level administrators found in a college or university. If the previous careers and career expectations of other middle level administrators in higher education are similar to those shown by these financial aids directors, much broader implications may be developed. If this is the case, large numbers of administrators in higher education, just as these financial aids directors, entered the field pretty much by accident and are not quite sure what positions in higher education are viable aspirational goals.

Certainly additional research is needed regarding the career patterns and career opportunities of administrators in higher education, and the skills and characteristics required of such individuals. Only with such information can top level administrators make effective decisions regarding institutional administrative structures, and the selection, training, rewarding, and advancement of the individuals who man them.

Higher education will continue to occupy a central role in our society and because of this it must be able to recruit and keep highly skilled and dedicated individuals as administrators. Up to now, too little attention has been paid to the administrative process and the organizational dynamics in higher education, and to the types of people needed as administrators. One small part of this problem is the need to make higher education administration in itself a visible and viable career alternative.

FOOTNOTES

¹ National Center for Educational Statistics, *Opening Fall Enrollment in Higher Education, 1968: Part B—Institutional Data*, U. S. Government Printing Office, Washington, D. C., 1969, 133 pp.

² Summaries of the actual responses to the questionnaire are available from the author at no charge.