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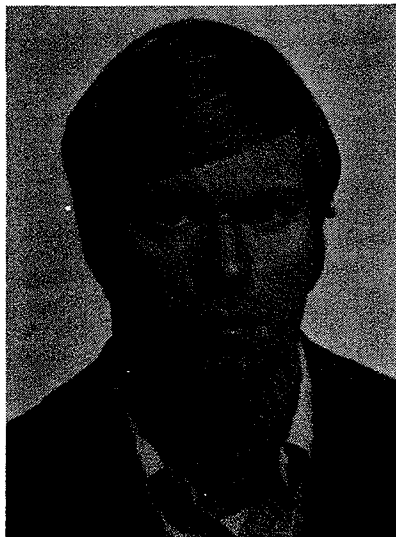
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# A STUDY OF CERTAIN PROFESSIONAL CHARACTERISTICS OF FINANCIAL AID ADMINISTRATORS AT INSTITUTIONS OF HIGHER EDUCATION IN THE STATE OF ILLINOIS

*Ronald J. Schiesz*

## *Introduction*

The passage of the National Defense Education Act of 1958 marked the dawning of the modern development of financial assistance programs for college students. Since that time, this field of endeavor has continued to grow in terms of total participants, funds, and programs to the point where present day student financial aid services represent a broad commitment to make higher education available to anyone who desires and can profit from it. With this growth has come a commensurate and urgent demand for a trained cadre of education officials to administer the student financial aid programs and to accept the responsibility of equitable distribution and accounting of funds. This responsibility requires an expertise in the diverse functional areas which are associated with administration of an aid program.



Mr. Schiesz is presently employed as an admissions officer with the College of DuPage at Glen Ellyn, Illinois. The study was conducted while the author was serving as a graduate intern at the Office of Student Work and Financial Assistance at Southern Illinois University, Carbondale.

Since the advent of separate regional professional organizations as well as the creation of a national association and professional journal, there has come a distinct rumbling among members of the field with regard to evaluating the present status of financial aid administration. This information would help to determine what specific steps must be taken within and among the membership in order to achieve fully the coveted status of a profession.

Although some effort has been made by researchers in recent years to examine the present professional characteristics of financial aid administrators, this practice is not yet an ongoing process. Only when it is, can the outcomes of the attempt to upgrade the professional qualifications and characteristics of aid administrators be accurately assessed. This would also serve to insure the development of a systematic effort toward obtaining a level of professional competence which is equal to the responsibility required to administer a modern and effective student aid program.

### *The Problem*

In order to assess the present professional status of financial aid administration accurately, a study was initiated by the Office of Student Work and Financial Assistance at Southern Illinois University at Carbondale in Fall, 1973. The purpose of this study was to investigate and describe certain professional characteristics of financial aid administrators at colleges and universities in Illinois.

### *Methodology*

In order to obtain the bulk of information needed for the study, this author modified and updated a previously developed questionnaire.<sup>1</sup> The population under investigation was delimited to the Illinois group of 128 student financial aid directors primarily because of the potential significance of the results for members of this group. Also considered was the belief that the member institutions of this group are a fairly representative sample of the present composition of institutions of higher education on a national level. A total of 98 aid directors responded, and out of that number, 92 of the questionnaires were usable. The proportion of usable returns was 72 percent. Twelve institutions of theology were not included in the study group.

In attempting to address itself to the central problem, the research instrument explored the following professional characteristics:

- a. career patterns of financial aid administrators
- b. amount and type of training by financial aid administrators
- c. methods employed by financial aid administrators to insure professional competence
- d. professional activities engaged in by financial aid administrators
- e. judgments of financial aid administrators concerning alternative avenues for achieving professional status

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1. The questionnaire which was developed in 1970 by the Western Committee of Higher Education Surveys sponsored by the College Entrance Examination Board was selected for modification.

Depending on relevance and application, analysis of all data was made on at least one of three dimensions: 1) the size of the aid program at the respective institution; 2) the aid administrator's time in the occupation; and 3) the type of college at which he was employed.

The size of the individual aid program was determined by the number of student aid applications processed annually. The time-in-the-profession variable was subgrouped so that each respondent was characterized as one who had either worked less than one year, one to three years, or over three years. The latter dimension was analyzed in terms of three basic types of institutions: private, public two-year, and public four-year. This analysis design is similar to that of the Willingham Study, allowing for ease in comparison in terms of these three dimensions.

The descriptive nature of the study warranted the explicit use of a frequency count analysis. These data were then coded, tabulated, and converted to percentages. This method of analysis of the data allowed for descriptive patterns to emerge related to the specific professional characteristics under examination. Comparisons were made between the three dimensions and previous studies by noting specific differences on given responses. Percentages were utilized in order to accommodate the differences in sample sizes of the different groups. An analysis of the composition of usable returns in terms of the above dimensions is displayed in Tables 1 and 2.

#### *Survey Of The Literature*

An extensive survey of related literature reveals that there have been four studies conducted which relate to the professional characteristics under investigation in this study. (Clarence Casazza, 1970; George Nash, 1967; James Puryear, 1968; Warren Willingham, 1970.)

All of these studies solicited information from a representative population so as to infer the results to a national population of financial aid directors. The studies were completed within a three-year period of each other (1967-1970), and were of a descriptive type employing the questionnaire as a research tool.

#### *Summary Of The Results*

The mean age of respondents in this study was 41 years; the mean age at the time of entry into the position was 36.8 years. Administrators at two-year public colleges were the youngest group at entry. The average tenure as aid director for all respondents was 4.4 years with the duration of tenure for the public four-year administrator (7.4 years) being more than twice that of his public junior college counterpart (3.1 years).

The mean length of time in the profession was 5.2 years with aid directors of large programs (greater than 1000 aid applicants) having the most experience (7.1 years). Here again, subjects from four-year public schools (9.9 years) had more than twice as much experience as those at state junior colleges (4.2 years). Only 34 percent of the sample was found to have more than one year of experience in financial aids work prior to assuming duties as aid director. This figure was even less for private school aid administrators (29%). A large majority of the sample had been recruited from the field of education (79%) into the financial aid field.

The subjects had an annual mean turnover rate of 22 percent and 47 percent of this group were hired from within the employing institution. Fifty-nine percent of the respondents were employed in full-time positions. Nearly one out of two subjects who worked in private school and public junior college institutions was employed in a part-time status with part-time responsibilities in another area (s). A positive correlation existed between the size of the aid program and the percentage of full-time aid directors.

The bachelor's level degree was the highest earned degree level for one out of every four aid directors. For two out of three subjects, the master's level represented the highest earned degree. The Ph.D. recipient (7%) tended to manage a large aid program at a four-year state college and had a term of work experience in the field which exceeded three years. Nearly one in five of the aid directors were presently enrolled in an academic program. A nearly equal proportion of all the aid administrators received their highest degree from the academic disciplines of education (21%), student personnel services (14%), guidance and educational psychology (22%), and business (21%). Those employed at a public four-year institution tended to have an academic background in business (50%) and those administering programs at state junior colleges had been students of guidance and educational psychology (44%).

Subjects were asked to respond on the usefulness of certain academic courses and to stipulate which of the courses they had actually experienced. Exactly eight out of every ten aid directors had experienced at least one of the ten related financial aid courses. Counseling skills (77%) and the history of higher education (51%) were the only two classes that had been engaged in by at least half the aid directors. The subjects had a strong tendency to judge classes as "useful" which had direct application to aid work. Only one aid director in five had experienced any type of course related to management and administrative techniques of financial aid work. There were no major differences displayed in the amount of academic training engaged in by aid officers at different types of institutions or by those employed in the position for various amounts of time.

A ratio of seven out of ten subjects had gained practical experience through on-the-job training. The internship method was heavily favored (80%) as the most desirable method of training although only 12 percent had an opportunity for such an experience.

### *Conclusions*

The conclusions and recommendations are based upon comparisons between the descriptive patterns that have emerged during the analysis of the data from this study and those of related studies:

#### I. Regarding the career patterns of financial aid administrators:

- a. Although the Illinois financial aid director tends to be a middle aged individual, his length of accumulated tenure in the position is relatively short. This shortness of tenure is especially pronounced for those employed at a state junior college or private institution.

- b. A discouragingly large proportion of the Illinois student financial aid directors have a limited amount of experience in the field prior to assuming their duties as director. This fact is most prevalent at private institutions and for directors of medium sized aid programs.
- c. Although the practice of intra-institutional hiring of neophyte aid directors is still quite pronounced, there is evidence that this practice is eroding when compared with past levels of other groups. Thus, movement by aid directors between colleges as demonstrated by the Illinois group, is becoming more prevalent.
- d. The data support previous conclusions that the bulk of aid directors is recruited from the field of education immediately prior to entering the aid profession. It should be noted that a sizable proportion of those employed at public four-year schools in Illinois came out of careers in private business.
- e. The study shows an annual turnover rate of slightly more than one out of every five chief financial aid administrators. This rate represents a decrease from previously reported levels. Nearly one in every four aid directors at state junior colleges of Illinois is experiencing his initial year as director.
- f. Although none of the aid directors at four-year state schools has part-time work responsibilities outside the financial aids field, this is still a fairly common phenomenon for aid administrators at private schools and state junior colleges. The size of the aid program appears to be an important influencing factor on the type of position held.

## II. Regarding the training and preparation of financial aid directors:

- a. The aid directors, as in previous studies, display a strong tendency to judge academic subjects which have direct application to their work as being "useful." The percentage of directors who have experienced class work relating to financial aids work has apparently grown, although very few aid directors in Illinois can attest to the fact that they have had any semblance of a specialized academic preparation in financial aid administration.
- b. Neither the type of institution nor the length of time in the position appears to have any effect on the amount or type of courses taken which relate to aid work.
- c. Even though the internship method of practical experience is judged by far the most desirable, very few aid administrators have had an opportunity for such an experience. On-the-job training after entrance into the financial aid field remains the primary method of practical training for neophyte financial aid administrators.
- d. The academic or educational level of attainment of aid directors has shown little change. The master's degree is not yet an accepted educational requirement of the chief aid administrator in Illinois, although approximately three out of four have earned this degree level or higher. The student aid director who has earned the

Ph.D. still seems to be a rare exception, especially for those at the private and public junior colleges.

- e. A large number of aid directors who are new to the position and those employed at public junior colleges are presently enrolled in a formal graduate degree program.
- f. A large majority of the aid directors have an educational background which is to some degree relevant to the nature of financial aids work. Here again there is a strong tendency for the aid administrator at the public four-year school to receive his highest degree in a business related discipline.

III. Regarding the methods employed by financial aid directors to ensure the maintenance of professional competence:

- a. The practices of attending professional meetings, reading professional journals and experiencing workshop sessions are still the most popular methods engaged in to maintain professional competence. The use of self-selected educational materials has gained considerably in popularity, perhaps displaying an increased availability of these materials. Few consider course work as a vehicle for maintaining competence.

IV. Regarding the professional activities engaged in by financial aid directors:

- a. The overall amount of professional activity engaged in by the Illinois group does show a marked increase from previous studies. Although the large majority of aid directors make a strong effort to keep informed on matters relating to financial aid, few take an active roll in strengthening their profession through participation in aid meetings, holding office in an aid association, and the like. Financial aid directors at public four-year colleges are apparently assuming a leadership role in actively attempting to promote the status of their profession.

V. Regarding the personal judgments of financial aid directors concerning alternative avenues for achieving professional status:

- a. Aid directors in Illinois display little agreement in their opinions as to ways of achieving professional status; state, regional, and national meetings are the only methods of needed action cited by a majority of the Illinois population of aid directors. A lack of agreement on the means of achieving full professional status does not necessarily indicate that aid directors attach a lack of importance to the goal.

#### *Recommendations*

The following recommendations are based both on the study data and the opinion of the researcher:

- 1. Greater attention and involvement in research needs to be exercised by the financial aid community. If professionalism is to be realized, then no longer can such excuses as the lack of research expertise or inadequate time be used. The simple truth is that the lack of practical research in the field is due in a large part to the inadequate acceptance

of the importance of research. If student financial aid is to achieve professional stature, research will have to play a paramount role in providing a knowledge base for the guiding principles and practices upon which the philosophy and goals of our profession will ultimately be built.

The National Association of Student Financial Aid Administrators and its affiliated regional associations should continue to exercise an active role in establishing the priorities for needed research related to the professional development of our field. Sanderson espouses that professionalism is a process of gradualism.<sup>1</sup> If this is true, we must strive to conduct an ongoing evaluation of such factors as the level of training of aid administrators, public acceptance of the profession, and other factors related to professional growth such as those of concern to this study.

2. A code of ethical standards and practices that will ultimately be accepted by the national community of aid directors should be developed. The contemporary financial aid administrator is an individual with a great deal of responsibility, and as such he must be cognizant of exactly what level of professional behavior is expected of him and his staff. Only then can public recognition and acceptance begin to be realized.
3. Aid associations need to establish steps that should be taken in promoting professional development among their constituents. Focus should be on the different needs of groups within the particular association membership. For example, this study demonstrates distinct differences between the professional development needs of those directors who manage small programs and those who administer large aid programs. It would be a mistake not to consider these differences when professional associations establish their priorities for professional development.

The study reveals that on the whole, it is the directors of smaller aid programs who are in the greatest need of opportunities for professional growth. Aid associations must continue to expand opportunities for the professional development of newly appointed aid directors and those working in a part-time status at the smaller schools.

4. Evidence has been presented which exposes the suspected void of specialized graduate level training programs in financial aid administration. If a professionally trained cadre of financial aid leaders is to become a reality, aid administrators, academicians, and aid associations must come to agreement as to what specific concentration of courses will provide the prospective aid administrator with the necessary skills. In conjunction with the academic training should come a commensurate

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1. Sanderson, James. "Why Professionalization for Financial Aid Officers?" *The Journal of Student Financial Aid*, May, 1971.



effort to establish opportunity for graduate students of financial aid administration to gain practical experience through paid internships while pursuing their graduate degrees.

The knowledge base for financial aid work is becoming increasingly dynamic and in recent years has become more extensive with the advent of new student services. For this reason, every effort must be made not only to insure that graduate programs are constantly updated, but that graduate departments offer non-traditional methods of academic training to aid administrators already in the field, such as extension courses, workshops, and self-study. If accomplished, they would go a long way toward insuring the continuous development and a systematic effort toward obtaining a level of professional competence which is equal to the responsibility required to administer a modern and effective student aid program.

5. More clearly defined avenues of professional promotion and advancement must come about. This is especially true if graduate training programs in financial aids administration become a reality, and a trained cadre of specialists in aid administration are spawned. The placement service of the National Association of Student Financial Aid Administrators should work to establish even closer ties with the individual institutions. This effort would help to dissolve the practice of intra-institutional hiring which still prevails and, hopefully, would serve to increase the movement of aid directors between colleges.

**TABLE 1**  
**COMPOSITION OF THE USABLE RESPONDENTS BY TYPE OF INSTITUTION, SIZE OF AID PROGRAM, AND DURATION OF EMPLOYMENT AS CHIEF FINANCIAL AID ADMINISTRATOR**

Type of Institution	Number of Respondents	Percent of Total Respondents
Private	49	53%
Public four-year	10	10%
Public two-year	33	37%
<b>Size of Aid Program</b>		
Under 300	30	32%
300 - 1000	36	39%
Over 1000	26	29%
<b>Length of Employment</b>		
Under one year	20	22%
One - three years	27	29%
Over three years	45	49%
All respondents	92	100%

**TABLE 2**  
**PERCENTAGE OF USABLE RETURN BY TYPE OF INSTITUTION**

Type of Institution	Original Sample	Usable Return	% Return
Private	71	49	69%
Public four-year	11	10	90%
Public two-year	46	33	71%
All respondents	128	92	72%

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