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"A DEAN SPEAKS OUT: THE FINANCIAL AID PROFESSION IN HIGHER EDUCATION"

by Ely Meyerson

For 10 years I have heard financial aid staff complain that they are misunderstood, at times maligned, and rarely supported. And all of this is said after everyone acknowledges how essential their program is to the student and to the very survival of the institution!

As a chief student personnel officer I have listened patiently, conducted intensive audits, battled for more office space, made the fight for additional staff, approved computer programs and installations, and even ignored — in an isolated and desperate moment or two — my own management and student personnel instinct. And to what avail? Some of the battles have been won, but it seems the tide has not yet turned. The folks from financial aid still feel treated as second-class citizens who must suffer all the trauma that is associated with minority standing in the community. It is now time for this Dean to speak out, to tell his colleagues in the financial aid sector that they are their own worst enemy. The help that is available is within your own ranks. It is time to clean up your act and to earn the professional status and reward that is here for the right asking.

To ask right, it is first necessary to review the problems, images and processes that you have created in your very brief professional lifetime. Once we agree about the terms of your liability, then perhaps we can decide on how you may redirect energies to assure the profession a more secure setting in the institution. The nature of your liability is many-faceted but is characterized by the following problems:

*Foreign Language Barriers.* Did you ever stop to take stock of the myriad of acronyms, abbreviations, agency designations and statistical references that cloud the basic mission you have to provide financial aid to needy and deserving students? We often have trouble understanding you since your language system is out of touch with English! And think of the poor student, confused parent, concerned legislator and well-intending Dean, all who really cannot begin to understand or to feel before they learn your symbolism and non-verbal language. Is there not a better way to communicate and to share your world?

*Fiendish Forms.* If you were to contrive ways and means to discourage students from applying for assistance, you could do no more than to insist that they must continue to fill out the applications now required. Requests for assistance should not have to be interpreted by the helping professions, duplicated elsewhere, and be mind-boggling and embarrassing to complete. It is significant that many a Dean has had to call it quits or yell for help when filling out forms for a very special son or daughter. It seems that too often there is pride of authorship associated

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with the forms that gets in the way of humanizing or making more efficient the process.

Overworked/Overlooked. You have been saying it so long that you must now believe that you are gravely overworked. I suppose that there are at least several times during the year when the midnight oil burns. But the fact remains that financial aid staff really have as much time off for vacation, sick leave, coffee breaks, professional improvement, travel, and plain old “goof-off time” as any other respectable group of student personnel workers. Still you cry you are over-worked, and as the boy who cried wolf you too will find that you will be overlooked and rejected by those who count. You must find more effective means to identify and represent your needs in the institution. Too often arguments have been made to increase staff without support data and justification.

Organizational Anxieties. It is well known that faculty rate parking and football ticket priorities high on their problem list. Such concerns do not escape the financial aid staff, but you suffer from additional tremors. You have spent endless hours arguing where you best fit into the organizational scheme of your institution. Should it be in business or student affairs? And why not have a Vice President’s title rather than a less-prestigious Director’s designation? Finally, there are still those institutions where it is being contested whether the financial aid advisor is a faculty member, manager, or some peculiar half-breed. Too often the answers to these questions have been made on the basis of personality, ego and power struggle. In such cases, you have not really earned respect from colleagues nor added to the integrity of the institution. There must be effective criteria and means available to determine the profession’s niche in the bureaucracy.

Washington Woes. Washington, D. C. and many a state capitol have contributed to the plight of the financial aid officer. Insensitive and insulated bureaucrats, forever changing regulations, competing social philosophies, and “ominous audits” all have substantiated the need that some have to control the institution. You have responded by developing your own lobbying group, a Washington, D. C. SWAT force, and by making numerous attempts to mold state legislation. The noble attempts too often have failed. It is time to change your tactics, to regroup your resources, and to seek out allies who have more experience and a better track record in establishing the beachheads. In so doing, you may find that you also will have more time to tend to the homefront!

The Student: Friend or Foe? There is not another agency on the campus that, in my judgment, has a more mixed reputation in the eyes of the student consumer than the financial aid office. Oftentimes the student is obliged to comply with federal, state, institutional and office regulations that bear no resemblance to the educational process. At other times the staff is found to have discretionary authority that really can make a difference in the financial facts of life for the student. And
finally, the front-line staff which greets every student has untold authority and information, or lack thereof, to make or break a student's day. In effect, there really does not seem to be a consistent set of educational and management cornerstones to guide staff effort and decision making. As well, the staff are sometimes misassigned or do not have the information that is necessary to serve the public. Is it any wonder that students are perceived and treated as friend and foe alike?

Regardless of the observations that have been tendered, I have always found my colleagues in financial aid to be highly committed, capable, and willing to grow. In the spirit that we share to improve the art of the profession and higher education in general, I recommend the following:

- Be certain that a straightforward glossary of abbreviations and related jargon is available to the entire campus community. And be certain not to slip into "jargonese" when conferring with those less fortunate colleagues who do not speak your language.

- Do all that is humanly feasible to use as few forms as is possible. The current trend is encouraging, but from my view the student should not have to complete more than one application for any type of assistance. It is also critical that all questions be intelligible, necessary, and respectful.

- Join the move to consolidate all federal loan activities and to manage better the grant programs. There is unnecessary overlap and duplication for the consumer. In addition, many states could do a more effective job in lining up their assistance programs in a way that would lead to better student comprehension and institutional responsiveness and accountability.

- Establish planning goals and objectives for your operation that are realistic, measurable and in concert with the educational and management goals of the institution. This type of planning should readily translate into human, fiscal and physical resource requirements. In applying basic management tools to your work, you will be in a far better professional position to argue for improvements.

- Organizational development should be built upon decisions that maximize communications, planning, student development, staff development, and evaluation activities. The organizational structure should assure a reasonable level of stability whereby the most capable and honorable individuals are recognized and rewarded.

- Financial aid staff do not conveniently fall into an existing classification, such as faculty, administrative/managerial or civil service. Your training and responsibilities qualify you for almost any abstract personnel designation. Egos should not get in the way of the decision. We must place priority on defining educational and management roles, staff relationships and benefits for the professional. Once this is done, my guess is that you might fit into any of the existing categories and that the final decision will be dependent upon local precedent, and conditions.

- The reporting line of financial aids will vary from campus to campus. Criteria to use in deciding the organizational structure must include how best to maximize service to the student, to coordinate related staff activities,
to respect local precedent that is logical, and to assure effective representation and sound development of the respective program.

- Give serious consideration to affiliating actively with other educational organizations to improve your lobbying efforts. In fact, why not consider merging your Washington office with any one of several established and well-connected groups? It may well be that you have become too specialized and disassociated from the mainstream of higher education. The track record is what counts and I argue that you could be far more effective if you merged with colleagues who have broader vision, greater resources, and more viable contacts.

- Select several supportive institutions in order that plans may be made to initiate a graduate program to train financial aid workers. Very little effort has been made in this area; as a result too many staff have come in through "the back door" and thus lack the conceptual and skill orientation associated with the true professional. An institution would not find it difficult to tie in this specialty with an existing MBA or MEd program by offering a minor concentration in courses and practicum relevant to the aspiring financial aid officer. A cadre of young professionals will lay the basis for professional respectability.

- It is critical that a professional code of principles be broadly enumerated. Such a code should clearly articulate those management and educational principles that govern policy development, decision-making, and student relations. In matters relating to the student, I suggest that your efforts be characterized by a strong commitment for delivering the service, an acknowledgment of the ideals that underscore the student development concept, and an awareness that we must be instrumental in creating an institutional environment in which students will have the best opportunity to learn. Finally, the code will not have any meaning unless it is utilized as a tool for the motivation and evaluation of staff and as a resource for program development.

To summarize my observations, I have concluded that the profession has generated a bit more self-pity than is healthy. The syndrome is accentuated by problems that you largely have created and are fully capable of resolving. Your professional jargon, regulatory procedures, perceived support system, political efforts and student views are in immediate need of assessment and probably re-direction. Such re-direction is not difficult to discover. It must focus upon long-standing principles of management, a commitment to sound student development and campus environmental principles, astute, political affiliation, communications, tactics and continuing in-house attempts to improve the preparation, performance and evaluation of the individual professionals in the field.

I cannot close without acknowledging the impressive contributions that have been made by financial aid staff. In an incredibly short period of time you have made resources available to tens of thousands of people who, without such resources, would have been unable to take advantage of post-secondary school opportunities. It is time now to assess the status of the profession in order that the students, the institution and yourselves will be better served.