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Guest Editors' Conclusions: Financial Aid Practitioner-Researcher Partnerships: Lessons from the Field

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Guest Editors' Conclusions:
Financial Aid Practitioner-Researcher Partnerships: Lessons from the Field

There are numerous barriers to conceiving, designing, and implementing successful research partnerships between financial aid practitioners and researchers, as described in our introduction (p. 1). In this concluding article, we discuss practical recommendations for starting and executing partnerships. We base these recommendations on reflections from four research teams, which are included in this special issue of the *Journal of Student Financial Aid* (Vol. 47, N3, 2017). As described in that introduction, in addition to advancing knowledge on important financial aid topics, the research teams contributed reflections on their collaborations from the distinct perspectives of the researcher and the practitioner. We prompted contributing authors to provide their thoughts on questions such as, *What worked well? What didn't work well? What challenges did you face? What unexpected benefits did you experience? What do you wish you knew at the beginning of this partnership?*

We also solicited four essays from experts who provided direct, useful advice about data security, writing clearly for distinct audiences, engaging with foundations, and incorporating state-level financial aid into research. The reflections and essays informed the following list of four overall lessons about research partnerships.

Key Takeaways

Lesson 1: Communication Is Key

Nearly every research team indicates that engaging in frequent, regular, and honest communication is key to a successful relationship. Because of distinct job schedules; demands, beliefs and experiences with research; and data considerations, early and recurrent conversations can help research teams properly plan and overcome issues as they arise. For example, Castleman, Meyer, Sullivan, Hartog, and Miller note that early conversations about data helped ease the research process:

> Researchers and practitioners prioritize both student privacy and maintaining careful, secure records to protect sensitive information, and by discussing early on what restrictions each group faces in data storage and transmission, we could avoid frustrations around not being able to share data and adjust our analyses to account for data limitations" (p. 23).

In-person meetings may be particularly helpful, as Sanchez and Smith suggest: "The proximity of our institutions facilitated opportunities to meet in person to review current progress, share inquiries, and exchange ideas. (p. 40)

Communication is critical at all stages of the research process, from the early creative stages and as the parameters of the research project inevitably change. Evans, Nguyen, Tener, and Thomas explain that, "From the beginning, we made efforts to meet with the financial aid colleagues in person to frequently discuss ideas, which resulted in a smooth collaboration" (p. 66). They continue,

> Another beneficial aspect of this collaboration has been the constant dialog about theories that are spawned by reviewing data and sharing our results with our colleagues. The knowledge and expertise the financial aid professionals provided…were invaluable in developing and testing explanations. (p. 66)

Sanchez and Smith add,

> Our dataset changed several times….We went back and forth with administrators to collect variables that would aid our analysis….being able to change course, be flexible, and use the data available was a challenge that I think we overcame beautifully. (p. 40)

Lesson 2: Build Relationships Prior to Engaging in a Research Partnership

Familiarity strengthens trust, which is critical for successful partnerships. Therefore, it may be helpful for researchers and financial aid administrators to try to build relationships before engaging in a project. Sanchez and Smith report they, "found it critical to have positive existing relationships, as they facilitated opportunities to be candid about the purpose (or refined purpose) of the study and its outcomes" (p. 40).

Such relationships often take time and energy to build, as Eichelberger, Foxhoven, and Mattioli describe: "One suggestion for collaborators in a project like this one is to work at building a rapport between departments; it does not seem to happen naturally, and it can be difficult" (p. 82). These authors also suggest that instructors invite practitioners into their classrooms; in addition to helping build relationships, the diverse perspectives can be valuable for students.

Researchers may also consider proactively sharing research findings with local aid administrators, as Castleman et al. explain: "Leaders within those offices were familiar with research conducted by UVA faculty…and those leaders were eager to pilot these strategies at the university" (p. 22). Practitioners can also invite researchers to discuss their research with local financial aid professionals. In addition to relationship building, this activity can help broaden theoretical bases, expand exposure to research from non-academic sources, and prompt discussion of local issues, as Heller explains in his essay starting on page 97, and is explored in an earlier work by Bensimon (2007).

Lesson 3: Prepare for Distinct Work Schedules and Job Demands

Both financial aid practitioners and researchers have time-consuming jobs, but often in different ways. For example, researchers often intensively work on research during times when there is a break from teaching, such as during the winter break, spring break, or summer—this often corresponds to periods when practitioners are consumed with planning, processing aid awards, or serving student needs. Evans et al. explain, "The challenge is to find the time for this work when there are many other pressing demands for our time that directly impact the delivery of financial aid to our students" (p.66). Therefore, plan early, as Castleman et al. recommend:

> Communicating early in the academic year about respective busy seasons allowed us to coordinate… around when all team members were able to give the project attention. Without such coordination, a partnership would likely be stalled by mismatched work cycles. (p. 22)

Eichelberger et al. advise planning for the unexpected and setting realistic time frames. They write:

> First, anticipate fluctuation in time management by building a schedule that supports the possibility of unplanned time commitments. Second, when planning and mapping out responsibilities, build a working model that supports unforeseen workload redistribution, such as staffing emergencies and multiple, concurrent projects. (p. 82)

Eichelberger et al. recommend leaving extra time for unexpected challenges: "The complexity of coordinating cross-disciplinary work schedules coupled with the inability to predict departmental and scheduling changes require allotting additional time at the planning stage to accommodate any unforeseen occurrences during the project" (p. 82). Such demands on our time can be difficult to overcome, but it is important to prepare for this inevitability.

Lesson 4: Take Advantage of Unique Skill Sets, but Recognize Differences

Administrators and researchers bring valuable but unique skills to a research partnership. Take advantage of the varied skills of the members of the team. Distinct backgrounds can also pose challenges. Collaborative writing was a prominent area in which differences in backgrounds caused issues for many of the research teams. Evans et al. explain:

> We think the greatest challenge we encountered was writing in a similar voice and style. The structure of the paper lent itself to a division of writing, and, as academics, we have a certain style of writing that is not regularly adopted in the real world. This made it challenging to make the paper sound like it was written in one voice throughout. (p. 66)

Sanchez and Smith add that the "language of financial aid comes naturally when one works in financial aid, but translating this language in an accessible way to faculty is no easy feat" (p. 40). Learning to write in a manner that is accessible to a diverse readership can enhance the work, per Sanchez and Smith:

> An important consideration for researchers who wish to collaborate across institutions is to ensure that all institutions have members of the team with both scholarly and practitioner perspectives. This can create a stronger balance not only in how the research is conducted but also in how it is interpreted and implemented in practice. (p. 40)

Looking Forward

The goal of this issue was to catalyze research partnerships with practitioners and researchers despite the potential challenges, risks, and competing interests. The research conducted not only broadened knowledge on financial aid, but also offered insight into the value of these types of partnerships to the research community and local context. Looking forward, we hope both practitioners and researchers will continue to see the value in such partnerships, increase such partnerships across the nation, and more regularly seek each other for scholarly inquiry and knowledge-sharing and dissemination.

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