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ABSTRACT

This survey was concerned with the present level of professional development of financial aid officers, their training needs, and their attitudes concerning future development of the profession. Results were based upon responses of aid directors at a representative group of 122 institutions in the West. Some of the principal findings were: (1) annual turnover appears to be somewhat lower and interinstitutional hiring somewhat higher than was true 4 years ago; (2) academic courses in each of 10 different areas were judged "very useful" by 50 to 90 percent of those who had taken the course; but in most cases fewer than 1 aid officer in 3 had taken the course; (3) three out of 4 aid officers felt that various forms of job orientation were desirable; (4) workshops were the favored method of maintaining professional competence and favored topics were such issues as minority/poverty problems, status of state and federal aid bills, and recent aid literature and research. (Author/AF)

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Professional Development of Financial Aid Officers

Warren W. Willingham

Higher Education Surveys
Report No. 2

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WESTERN COMMITTEE FOR HIGHER EDUCATION SURVEYS NO. 2

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Higher Education Surveys is an activity of the College Entrance Examination Board. The purpose is to provide member institutions with a convenient means of gathering pertinent information about important current problems in college admissions. The survey described in this report was executed by the Western Committee for Higher Education Surveys No. 2 with the staff support of Warren Willingham and Richard Ferrin of the College Board's Access Research Office in Palo Alto, California, and William Van Dusen and Robert Cameron of the Western Regional Office, also in Palo Alto. The Western Committee is responsible for defining the topic and specific questions included in this survey. The College Board staff is responsible for gathering the data and reporting the results. Since a primary objective of this project is to make known the results obtained from the committee's questionnaire as rapidly as practical, this staff report is a factual accounting without interpretation or evaluation. Appreciation is expressed to the many respondents who made this rapid survey possible by returning questionnaires within a few days.

Contents

Abstract.	1
Introduction.	3
Procedure	5
Results	7
Tables:	
1. The total population of Western colleges and the constitution of the original sample and actual respondents	16
2. Percentage of aid officers who have worked in financial aid for various periods of time--by type of institution and size of aid program	17
3. Turnover in financial aid positions and interinstitutional hiring--by type of college and size of aid program.	18
4. Type of position held by aid officers--by type of institution, size of aid program, and time in profession.	19
5. Percentage of institutions providing released time for activities related to professional development--by type of institution and size of aid program	20
6. Percentage of institutions providing reimbursed expenses for activities related to professional development--by type of institution and size of aid program	21
7. Extent to which aid officers report they are responsible for determination of aid policies on their campuses--by type of institution, size of aid program, and time in profession.	22
8. Percentage of aid officers judging various academic courses "very useful"--by degree of professionalization and whether respondent had direct experience with such a course	23
9. Percentage of aid officers having taken academic courses in various areas--by type of institution, time in profession, and size of aid program	24
10. Percentage of aid officers judging various types of job orientation desirable for new aid officers--by type of institution, time in profession, and size of aid program.	25

11. Percentage of aid officers who received various types of job orientation--by type of institution, time in profession, and size of aid program. . . . .	.26
12. Percentage of respondents indicating various workshop topics as "most useful" for the training of new aid officers--by type of institution and time in profession. . . . .	.27
13. Percentage of respondents who favor each of three methods by which new aid officers might gain practical experience--by type of institution, time in profession, and size of aid program. . . . .	.28
14. Percentage of aid officers reporting they would use, if available, various methods of maintaining professional competence--by type of institution, time in profession, and type of program. . . . .	.29
15. Percentage of experienced aid officers in different types of institutions and programs who judge various workshop topics as "most useful" for maintaining professional competence of experienced officers . . . . .	.30
16. Percentage of aid officers who have undertaken various types of professional activity--by type of institution, time in profession, and size of program . . . . .	.31
17. Percentage of aid officers at different levels of professionalization. . . . .	.32
18. Percentage of aid officers who rate various methods of professional development as "very important"--by type of institution and within a select group of professional leaders. . . . .	.33
19. Percentage of aid officers who rate various potential functions of a national office as "very important"--by type of institution and within a select group of professional leaders. . . . .	.34
20. Percentage of aid officers who judge the development of various service and ethical standards as "very important"--by type of institution and within a select group of professional leaders . . . . .	.35
Bibliography . . . . .	.37
Survey respondents . . . . .	.39
Questionnaire. . . . .	.41

Abstract

This survey was concerned with the present level of professional development of financial aid officers, their training needs, and their attitudes concerning future development of the profession. Results were based upon responses of aid directors at a representative group of 122 institutions in the West. Principal findings were:

1. Annual turnover appears somewhat lower and interinstitutional hiring somewhat higher than was true four years ago. Some nine out of ten moderate-to-large aid programs in the West are now administered by a full-time aid officer (or more than one part-time).
2. Academic courses in each of ten different areas were judged "very useful" by 50-90% of those who had such a course; in most cases, fewer than one aid officer in three had taken the course.
3. Typically, three out of four aid officers felt that various forms of job orientation were desirable; one in three reported having received such orientation themselves.
4. Workshops were the favored method of maintaining professional competence; favored topics were current issues such as minority/poverty problems, status of state and federal aid bills, and recent aid literature and research.
5. One out of three aid officers can be classified at a low level of professional development in the sense that they are involved in few professional activities. This group includes almost half of junior college aid officers and three-fourths of part-time aid officers working alone.
6. The steps most often recommended for furthering development of the aid profession were development of a code of ethical standards, additional workshops, state and regional meetings, and a journal devoted to financial aid.

Introduction

Substantial financial assistance programs for college students began to develop only during the late 1950's. These programs generated an immediate and urgent need for a specialized group of college officials to administer student aid programs, counsel students regarding their financial problems, and assume responsibility for equitable disbursement and accounting of sizable resources. Some colleges have had an aid officer for many years, but this professional speciality has developed largely within the past decade.

The purpose of this survey is to provide current information regarding levels of experience, training needs, and attitudes concerning priorities for future professional development. There are ample signs that the profession is not yet fully developed but taking steps to become so. Informal comparison of yearly rosters of financial aid officers indicates that turnover is high. Recent statistics show that aid officers receive the lowest median salary of all senior college administrators ("Chronicle of Higher Education", 1970). But leaders in the profession evidence much interest in improving levels of competence and professional standards, and associations of aid officers have developed rapidly in recent years.

In a detailed study Nash (1968a) documented a great deal of useful information concerning the aid officer in the senior institution--his characteristics and attitudes, the nature of his work, and his relations with colleagues and those he serves. In general, Nash found his respondents to be well-educated, mature administrators who are reasonably well satisfied with the nature of their work. Puryear (1969) repeated Nash's survey questionnaire in some 340 two-year colleges and obtained generally similar results. The two-year aid administrator was slightly older than his four-year counterpart but tended to have a smaller supporting staff.

An understandable difference lay in the fact that senior college aid officers are much more likely to have graduated from their college of employment than are those in junior colleges.

In a subsequent article, Nash (1968b) commented upon weaknesses in the aid profession associated with its youth and made several general suggestions regarding the need for professional development. There is some question, however, regarding the priorities Nash chose to emphasize. He placed greater stress upon the need for aid officers to read research literature and carry out studies than upon their specific requirements for adequate training and maintenance of professional competence.

The financial aid profession has been especially sensitive to the need for further development. Professional communications emphasize this fact (e.g., Huff, 1970). Indeed, professional organizations in some areas have proliferated. There are, for example, five in the state of California (WASFAA, 1970). The National Council of Student Financial Aid Administrators represents the interests of six regional associations. It has laid plans for a number of professional activities and services to be developed over the next several years.

Nonetheless, these activities are yet quite limited, and they relate more directly to the organization of professional affiliation than to the development of professional competence. While there are various useful publications concerned with the fundamentals of administering an aid program (e.g., Van Dusen and O'Hearne, 1968; College Entrance Examination Board, 1968), such materials form only a temporary basis for adequate professional understanding. Leaders in the aid profession recognize the need for a more systematic effort to insure that financial aid officers achieve a level of professional competence commensurate with their responsibility.

A hindrance is the lack of adequate information concerning the present status of aid officers. Though the Nash study was useful in describing many characteristics of aid officers some five years ago, it did not provide the sort of specific information helpful in considering useful next steps in the development of a rapidly changing profession. The purpose of this survey was to provide current information, highly focused on the present degree of professionalization, the training needs, and judgments concerning alternatives for professional development.

Towards these ends, information was obtained directly from a representative group of financial aid officers in the Western United States. (See list of respondents on pp. 39-40) While this section of the country is not presumed to be greatly different from other regions with respect to the questions at hand, caution must naturally be exercised in generalizing too readily.

Procedure

An important objective of Higher Education Surveys is to produce results quickly without the usual lag between collecting data and reporting research findings. Consequently, the survey procedures and the questionnaire itself were designed to facilitate rapid responses from the colleges and rapid analysis. A single-page questionnaire was used, and answers to practically all questions were quantifiable. (See questionnaire on p. 41)

A committee of leaders in education and financial aid in the Western United States (see list at front) was formed to develop the questionnaire and to assist in the conduct of this study. The Western committee devoted one meeting to a thorough discussion of the problems of professional development in financial aid and to identification of particular issues deserving study. These issues identified by the committee centered around current professional charac-

teristics, degree of professionalization, training and orientation, maintaining professional competence, and other forms of needed professionalization. At a meeting on October 12, the committee selected and edited the specific questions included in the questionnaire.

This survey was based upon a representative sample of Western institutions. As Table I indicates the sample was drawn so as to achieve the proper balance of colleges with respect to size, control, and selectivity. Religious and special institutions were also sampled separately. The former are not necessarily colleges with a formal religious affiliation, but those which place heavy emphasis upon religious practice or training for religious work; the latter specialize in fields such as music and art.

The sampling proportions were set so that sufficient returns would be available for analysis of three basic groups of colleges: Private, public 4-year, and public 2-year. This breakdown required oversampling among public 4-year institutions (including universities), but final results were adjusted so that all institutions were weighted properly.

In many cases the results were also analyzed on two other dimensions judged particularly important by the committee: The aid officer's time in profession and size of the aid program at the college. Time in profession was handled simply by separating all respondents into three groups: Those who had been in aid work less than one year, one to three years, and over three years. The committee decided that number of aid applicants was the most practical and defensible means of identifying the size of the aid program.

Questionnaires were mailed on October 14 to the Director of Financial Aid or that individual who assumes day-to-day operational responsibility for administering the aid program. By October 28 usable replies had been obtained from 91% of the 134 colleges in the original sample. (See list on p. 39.)

Results

Professional characteristics

The aid profession is not plagued with inexperience to the extent it was a few years ago. The typical Western aid officer in private or public 4-year institutions has worked in financial aid for three or more years, though those in 2-year colleges have less tenure (Table 2). Relatively few aid officers have less than one-year experience, and these tend to be concentrated in the institutions with small aid programs.

Turnover has evidently reduced somewhat since Nash reported that 38% of aid directors changed jobs during a one-year interval. The corresponding figure for this Western group four years later was 28%. There also appears to be some movement toward interinstitutional hiring. Whereas Nash reported that only one in twenty aid officers held a previous position in financial aid at another college, the data of this survey indicate that among those recently hired, one in three was recruited from another college (Table 3). Half of these had worked in an aid position.

In this sample of colleges, it appears that the part-time aid administrator who works without additional professional support is largely a phenomenon of the college with a small aid program. Some 15% of the colleges in the West have less than 300 applicants; the other colleges divide almost equally between those with fewer or more than 1000 applicants. Most of those colleges with less than 300 aid applicants handle aid on a part-time basis. In better than nine cases out of ten, the larger programs have at least a full-time equivalent professional in charge (Table 4).

While the aid officers administering the larger programs are likely to be more experienced, full-time personnel, they also receive more support for professional development from their institutions. Aid administrators in public 4-year institutions and those handling more than 1000 applicants a year are much more frequently

granted released time (Table 5) and reimbursed expenses (Table 6) for professional activities. This is particularly true of meetings out-of-state and outside professional activities.

Despite differences in opportunity for professional development, respondents in different situations reported similar levels of responsibility for policy decisions. Indeed the administrators who most frequently reported primary responsibility for financial aid policy on their campus were those at 2-year colleges where institutional support for professional development is often the most limited (Table 7).

Academic background

Among those academic areas included in the questionnaire, some were judged "very useful" far more frequently than others. In general, the courses having direct application to aid administration were most often cited as useful (Table 8). For example, school law was checked by only 31% of respondents while five out of six respondents checked Counseling and also Need Analysis. The more practical courses were cited especially often by aid officers who have achieved only a relatively low level of professionalization*.

A consistent aspect of Table 8 is the fact that a larger percentage of aid officers who had had a particular course rated the course as very useful than did the total group of respondents. In some cases the difference was substantial. For example, only 28% of all respondents cited Finance and Taxation as a very useful course, but the percentage was 61% among those who had actually taken such a course. In each of the academic areas listed, the majority of respondents who had had such a course felt that it was

* See subsequent section for definition and data on levels of professionalization.

very useful. In the case of counseling, 98% viewed some coursework helpful.

The findings on the number of aid officers who have taken academic coursework present a different picture. While the percentages vary from course to course, typically less than one respondent in three had taken any one of the courses listed in Table 9. A number of discrepancies are apparent in comparing Table 8 and Table 9. Slightly over half of all respondents had taken a course in Counseling while less than one in five had taken a course in Data Processing, Aid Administration, or History and Philosophy of Financial Aid. All four of these courses were judged very useful by a large majority of those who had had any experience with the course.

The data do not indicate any marked differences in the extent of academic coursework among aid officers at different types of institutions. Also, there is no clear indication that persons entering the aid profession recently are any more likely to have taken relevant courses than those who entered the profession several years ago. The results do indicate that administrators of large programs are more likely to have taken relevant courses than those who handle small aid programs. The data are not sufficiently reliable to lay much store in differences among groups in the particular pattern of courses taken.

Job orientation

Most respondents were very much in agreement on the matter of job orientation. Typically, three out of four felt that those types of orientation listed in Table 10 are desirable for new aid officers. The need for orientation was expressed especially frequently by aid officers working in institutions with large aid programs.

Results in Table 11 indicate an apparent discrepancy between the cited need for job orientation and the orientation actually

provided. Typically, three out of four aid officers feel that various forms of orientation are important, but only one out of three report having received any such orientation themselves. This situation does not differ consistently among different types of institutions, though Table 11 does provide some spotty evidence that officers new to the profession are somewhat more likely to be receiving orientation than was true in the case of those who entered three or more years ago.

Table 12 provides detailed information concerning respondents' views of the "most useful" workshop topics for new aid officers. Topics most frequently checked are usually concerned with the immediate problems of coping with the administrative responsibility an aid program entails. The views of aid officers in different situations did not vary greatly on this question.

Approximately three respondents in five favored the internship as the best method for new aid officers to gain practical work experience. Other respondents split almost evenly between the summer institute and on-the-job training. Aid officers who recently entered the profession were more likely to favor summer institutes than were other groups. This may be a reflection of the training problem facing an individual already bearing responsibility for an aid program (Table 13).

Maintaining professional competence

Workshops and professional meetings were favored by the largest number of respondents as preferred methods of maintaining professional competence (Table 14). One interesting finding was the fact that self-instructional materials (if available) were seen as a desirable method by more than half of the respondents. Coursework, on the other hand, was checked least often.

Aid officers in different situations did not differ markedly in their preferences among methods of maintaining competence, but the more experienced respondents did lean toward traditional approaches such as meetings and journals. Junior college aid officers were more likely to regard summer institutes as an appropriate method than were officers from other types of colleges.

The workshop topics aid officers judged "most useful" for maintaining professional competence of experienced professionals were those topics which are more likely to have current relevance and represent new information (Table 15). Examples include: Status of aid bills, minority/poverty issues, trends in education, recent literature and research findings, etc.

Variations in the collective judgments of officers in different settings seem to reflect variation in the nature and level of their involvement with financial aid problems. Respondents from 4-year public (typically large) institutions stressed more policy-oriented interests; those from colleges with small programs checked fewer workshop topics and preferred the more practical ones; those from community colleges also leaned to practical topics with special emphasis on need analysis.

Degree of professionalization

Table 16 shows the percentage of various groups of respondents who reported different professional activities. These examples of professional behavior range from very common activities (e.g., reading newsletters, attending meetings) to fairly uncommon activities characteristic of individuals who have become closely identified with the profession and who exercise special initiative in their professional activity (e.g., publishing papers, serving as an officer of an association).

It is first noteworthy that one out of four financial aid officers do not ordinarily attend meetings of aid associations, and two out of five do not read either "Chronicle of Higher Education" or "Higher Education and National Affairs"--two of the more prominent periodicals reporting national developments relevant to the aid profession. The middle three items listed in Table 16--attendance at a meeting of secondary professional interest, participation in an aid meeting, and committee work for an aid association--are examples of activities which are probably common in well-developed professions. Typically, no more than one out of three aid officers reports these activities.

The professional activities of high frequency--the first four in Table 16--are characteristic of aid officers in all situations. It is the less common activities which clearly differentiate respondents from colleges with small aid programs or aid officers new to the field.

In order to provide some means of estimating the extent of professionalization of different groups of aid officers, each respondent's answers to the question on professional activities was scored from zero to ten according to the number of activities checked. This provides a rough index of professionalization for each respondent, valid only for group comparisons and to the extent that such items as those listed do represent meaningful professional activities. All scores were grouped into high, medium, and low levels of professionalization. Since the four most common activities are relatively passive and not very demanding, a score of less than four was designated "low." A score of seven or higher was designated "high" on the grounds that this score implies that the respondent checked at least half of the remaining six activities, each of which requires somewhat more initiative.

Table 17 shows the relationship between these levels of professionalization and other characteristics of aid officers. It is evident that the highly professionalized aid officer is usually an experienced officer at a large institution. Of special interest is the fact that more than one in three aid officers fall into the low level of professionalization. Respondents at this low level of professional development constitute:

- almost half of junior college aid officers
- two-thirds of all respondents from colleges with small aid programs
- almost three-fourths of part-time respondents working without additional professional assistance
- one-third of respondents who report primary responsibility for aid policy on their campus

Needed professional development

Among various suggested avenues for furthering professional development, roughly one respondent in two marked the following as "very important": State meetings, regional meetings, code of ethical standards, a journal devoted to financial aid, and additional workshops. Professional leaders were less inclined to value additional workshops and more inclined to value a set of recommended credentials. In most cases there were not large differences in the judgment of respondents from different types of institutions, though the need for a code of ethical standards was frequently cited by aid officers from private colleges. Also, the need for additional workshops was noticeably lower among respondents from public senior colleges than from other types of institutions (Table 18).

In response to the question of what function a national executive secretary should serve, there was relatively good agreement among respondents at different types of institutions. The functions

most often designated "very important" were general forms of representation such as testifying on federal bills and reporting Washington activities (Table 19).

Three types of service or ethical standards were frequently judged "very important". These were responsibility to students, responsibility to the college, and confidentiality of records (Table 20). There were not marked differences in the judgments of respondents from different types of institutions, but there were two sizeable discrepancies in the response of professional leaders. This latter group placed much more emphasis than did other respondents upon the aid officer's relationship to his public constituency and the high schools from which his students come.

Respondents offered a wide variety of comments and suggestions regarding steps most needed in furthering professional development. Many aid officers voiced the opinion that college administrators and faculty fail to understand the importance of the aid function. Respondents often blamed this condition upon a lack of understanding of purpose and functions within the profession. One aid officer cited a need for "the development of a clear and concise statement of the role of an aid officer in the administration of a college. The aid officer himself needs a clear view of his relationship to others."

As would be expected different people see different routes to their own image of the profession. Many cited the need for specific academic or credential requirements to up-grade the profession. Some see this development initiated by the national association. As one respondent put it, "I feel the professional development of aid officers hinges upon the success of a strong, adequately funded national organization to take the lead in developing the profession."

A significant minority chose to place special emphasis upon the humanistic demands of the aid profession. One called for "a new emphasis on financial aid as a kind of personal art which will enable the aid officer to get away from viewing himself as a need-analyses technician." As another respondent put it, "We have to keep the profession as human as possible."

Table 1. The total population of Western colleges and the constitution of the original sample and actual respondents

Type	All colleges	Sample ratio	Original sample	Actual respondents	% of original sample	% of actual respondents
Public						
Four-year						
Selective-over 15,000	17	.6	10	10	7%	8%
Selective-5,000-15,000	20	.6	12	12	9	10
Selective-under 5,000	13	.6	8	8	6	7
Non-selective-over 5,000	10	.6	6	5	4	4
Non-selective-under 5,000	14	.6	8	8	6	7
Two-year						
Over 3,000	81	.3	24	20	18	16
Under 3,000	81	.3	24	22	18	18
Private						
Liberal Arts						
Selective-over 1,000	29	.3	9	8	7	7
Selective-under 1,000	20	.3	6	6	4	5
Non-selective-over 700	11	.3	3	3	2	2
Non-selective-under 700	12	.3	4	2	3	2
Religious						
Over 1,000	15	.3	5	5	4	4
Under 1,000	36	.3	11	10	8	8
Special purpose	13	.3	4	3	3	2
Total	372		134	122	99	100

Table 2. Percentage of aid officers who have worked in financial aid for various periods of time-- by type of institution and size of aid program

	% Having worked in aid for:		
	Less than 1 year	1-3 Years	Over 3 years
Type of institution			
Private	14%	41%	46%
Public 4-year	12	21	67
Public 2-year	19	50	31
Size of aid program			
Under 300 applicants	25	38	37
300-1000 applicants	14	49	36
Over 1000 applicants	5	29	65
All respondents	15	40	44

Table 3. Turnover in financial aid positions and interinstitutional hiring--by type of college and size of aid program

	% in this position less than 1 year	% of those hired in past year who came from another college
Type of institution		
Private	23%	25%
Public 4-year	30	31
Public 2-year	31	38
Size of aid program		
Under 300 applicants	29	33
300-1000 applicants	28	23
Over 1000 applicants	27	47
All respondents	28	33

Table 4. Type of position held by aid officers--by type of institution, size of aid program, and time in profession

	% Working:		
	Full-time	Part-time, alone*	Part-time, with others*
Type of institution			
Private	51%	35%	14%
Public 4-year	86	2	12
Public 2-year	55	33	12
Time in profession			
Less than 1 year	68	26	6
1-3 years	57	25	19
Over 3 years	61	30	9
Size of aid program			
Under 300 applicants	21	70	10
300-1000 applicants	72	11	17
Over 1000 applicants	87	4	9
All respondents	60	27	12

* Designation "alone" versus "with others" refers to professional staff only.

Table 5. Percentage of institutions providing released time for activities related to professional development--by type of institution and size of aid program

Type of activity	% Providing released time						
	Type of institution		Size of aid program			All respondents	
	Private	Public	Under 300	300-1000	Over 1000		
Meetings within state	86%	91%	83%	78%	88%	93%	86%
Meetings out-of-state	49	70	40	32	48	73	50
Coursework related to job	27	58	26	22	30	51	33
Outside professional activities	22	51	31	14	34	49	32
Attendance at workshops	73	91	76	62	81	93	78

Table 6. Percentage of institutions providing reimbursed expenses for activities related to professional development--by type of institution and size of aid program

Type of activity	% Providing reimbursed expenses						
	Type of institution		Size of aid program			All respondents	
	Private	Public	Under 300	300-1000	Over 1000		
Meetings within state	89%	95%	93%	81%	100%	93%	92%
Meetings out-of-state	49	72	40	32	49	73	50
Coursework related to job	30	33	5	13	20	27	20
Outside professional activities	19	37	19	8	24	38	23
Attendance at workshops	76	79	81	68	86	80	79
Office subscriptions	70	72	45	44	63	75	60

Table 7. Extent to which aid officers report they are responsible for determination of aid policies on their campuses--by type of institution, size of aid program, and time in profession

	% Who report being responsible		
	Primarily	Partially	Slightly*
Type of institution			
Private	57%	43%	-
Public 4-year	74	23	-
Public 2-year	86	12	-
Size of aid program			
Under 300 applicants	65	35	-
300-1000 applicants	68	32	-
Over 1000 applicants	80	17	-
Time in profession			
Less than 1 year	70	30	-
1-3 years	72	24	-
Over 3 years	76	24	-
All respondents	73	26	-

* Only one respondent indicated slight responsibility

Table 8. Percentage of aid officers judging various academic courses "very useful"--by degree of professionalization and whether respondent had direct experience with such a course

	% Judging course very useful			All respondents
	Professionalization* High	Low	Respondents who had such a course	
Data processing	36%	93%	88%	54%
History & philosophy of financial aid	61	97	82	67
Accounting	55	60	83	52
Statistics	47	63	72	46
School law	32	33	52	31
Need analysis	77	97	91	83
Finance & taxation	28	33	61	28
Counseling	73	90	98	84
Research methods	36	57	66	39
Aid administration	66	87	83	73

* See definition on page 12.

Table 9. Percentage of aid officers having taken academic courses in various areas--by type of institution, time in profession, and size of aid program

Academic area	Type of institution			Time in profession		Size of aid program*			All respondents
	Private 4-year	Public 2-year	Public 4-year	Under 1 year	Over 3 years	Small	Large		
Data processing	19%	23%	12%	6%	24%	10%	36%	17%	
History & philosophy of financial aid	14	14	7	6	11	0	11	11	
Accounting	32	28	36	32	34	16	40	33	
Statistics	32	37	45	48	37	33	49	39	
School law	16	21	50	35	27	22	29	31	
Need analysis	24	28	17	19	22	16	27	22	
Finance & taxation	27	7	21	26	18	19	16	20	
Counseling	46	60	67	61	52	41	64	58	
Research methods	19	42	36	42	27	24	42	31	
Aid administration	11	14	12	19	11	10	11	12	

* Small = under 300 applicants per year; large = over 1000 applicants

Table 10. Percentage of aid officers judging various types of job orientation desirable for new aid officers--by type of institution, time in profession, and size of aid program

Type of orientation	Type of institution			Time in profession			Size of aid program*		
	Private	Public 4-year	Public 2-year	Under 1 year	Over 3 years	Small	Large	All respondents	
Job responsibilities	81%	95%	95%	84%	85%	78%	96%	90%	
Limits of authority	70	77	69	68	61	51	80	71	
Institutional policies	84	95	88	74	84	76	98	88	
Office administration	73	93	71	71	80	62	85	77	
Overview of yearly work	57	67	69	74	56	41	71	64	
Program procedures	62	95	83	81	75	54	87	78	
Minority/poverty issues	70	79	79	77	72	59	84	76	
Relations with other offices	62	88	64	65	67	43	82	69	
Procedures manual	78	88	81	81	76	67	87	82	

* Small = under 300 applicants per year; large = over 1000 applicants

Table 11. Percentage of aid officers who received various types of job orientation--
by type of institution, time in profession, and size of aid program

	Type of institution			Time in profession			Size of aid program*			All respondents
	Private	Public 4-year	Public 2-year	Under 1 year	Over 3 years	Small	Large			
Job responsibilities	65%	49%	40%	65%	48%	44%	45%	51%		
Limits of authority	46	30	24	45	29	29	29	33		
Institutional policies	65	42	55	65	43	51	47	56		
Office administration	27	21	29	42	19	29	24	26		
Overview of yearly work	22	9	17	19	8	13	15	17		
Program procedures	27	33	31	29	22	17	25	30		
Minority/poverty issues	16	16	17	29	9	6	20	16		
Relations with other offices	22	47	33	32	34	17	45	32		
Procedures manual	46	44	31	29	38	30	42	39		

* Small = under 300 applicants per year; large = over 1000 applicants

Table 12. Percentage of respondents indicating various workshop topics as "most useful" for the training of new aid officers--by type of institution and time in profession

Workshop topic	Type of institution		Time in profession		All respondents
	Private	Public	Under 1 year	Over 3 years	
Office procedures	70%	86%	48%	80%	70%
Research methods	41	47	35	44	41
Trends in education	43	37	27	38	43
Preparing reports	73	93	73	89	84
Economic trends	35	47	25	44	37
Record systems	59	77	59	80	74
Research findings	32	49	17	49	39
Status of aid bills	59	67	65	58	66
Interview techniques	62	84	63	78	69
Recent aid literature	57	72	60	64	62
Major aid programs	68	93	56	87	77
Need analysis	86	100	81	100	93
Data processing	32	67	17	62	42
Personnel administration	27	60	10	56	37
Minority/poverty issues	57	88	68	80	74

Table 13. Percentage of respondents who favor each of three methods by which new aid officers might gain practical experience--by type of institution, time in profession, and size of aid program

	% Favoring each method		
	Internship	Summer institute	On-job training
Type of institution			
Private	63%	11%	26%
Public 4-year	68	14	19
Public 2-year	59	35	5
Time in profession			
Under 1 year	52	41	7
1-3 years	57	25	18
Over 3 years	72	12	17
Size of aid program			
Under 300 applicants	58	23	19
300-1000 applicants	62	25	13
Over 1000 applicants	67	15	17
All respondents	62	22	16

Table 14. Percentage of aid officers reporting they would use, if available, various methods of maintaining professional competence-- by type of institution, time in profession, and type of program

Method of maintaining competence	% Who would use method									
	Type of institution		Time in profession			Size of aid program*		All respondents		
	Private	Public	4-year	2-year	Public	Under 1 year	Over 3 years	Small	Large	All respondents
Occasional coursework	38%	35%	29%	29%	30%	21%	35%	21%	35%	33%
Workshop	76	86	88	81	75	70	84	70	84	83
Professional meetings	70	81	81	55	82	62	85	62	85	77
Professional journals	59	65	52	48	64	43	78	43	78	58
Summer institute	24	33	55	52	31	30	38	30	38	39
Self-study materials	59	51	60	55	57	57	58	57	58	58

* Small = under 300 applicants per year; large = 1000 applicants

Table 15. Percentage of experienced* aid officers in different types of institutions and programs who judge various workshop topics as "most useful" for maintaining professional competence of experienced officers

Workshop topic	Type of institution			Size of aid program			All respondents
	Private	Public 4-year	Public 2-year	Small	Large		
Office procedures	13%	26%	32%	17%	19%	24%	
Research methods	59	50	38	38	62	49	
Trends in education	69	76	44	47	63	61	
Preparing reports	44	39	50	47	35	45	
Economic trends	47	66	50	45	67	53	
Record systems	41	50	56	34	50	49	
Research findings	56	71	50	26	65	57	
Status of aid bills	75	92	79	66	85	81	
Interview techniques	25	39	29	34	35	30	
Recent aid literature	47	71	59	43	71	57	
Major aid programs	31	26	35	32	25	32	
Need analysis	41	26	71	49	35	49	
Data processing	41	66	50	30	56	50	
Personnel administration	34	50	35	30	40	38	
Minority/poverty issues	50	84	82	62	71	71	

*This table is based only upon replies of aid officers with at least one year of experience in financial aid administration.

Table 16. Percentage of aid officers who have undertaken various types of professional activity--by type of institution, time in profession, and size of program

Professional activity	Type of institution			Time in profession			Size of aid program*			All respondents
	Private	Public 4-year	Public 2-year	Under 1 year	Over 3 years	Small	Large			
Read aid newsletters regularly	92%	95%	86%	84%	90%	78%	95%		90%	
Attend aid association meetings	65	88	74	55	80	51	84		74	
Follow progress of aid bills	78	91	64	61	81	62	87		75	
Read "Chronicle of Higher Educ." or "Higher Educ. and National Affairs"	65	84	45	55	66	51	84		61	
Attended AACAC, AACRAO, or APGA	38	12	24	13	31	29	25		26	
Participated in aid meeting (read paper, led discussion)	19	60	31	19	45	11	55		33	
Committee work for aid association	19	51	26	6	40	3	55		28	
Published aid article	8	9	2	0	11	0	15		6	
Served as consultant	30	35	21	3	31	11	36		23	
Held office in aid association	14	35	14	3	28	0	38		18	

* Small = under 300 applicants per year; large = over 1000 applicants

Table 17. Percentage of aid officers at different levels of professionalization*

	% at each level of professionalization*		
	Low	Medium	High
Type of institution			
Private	35%	51%	14%
Public 4-year	19	44	37
Public 2-year	48	48	5
Time in profession			
Under 1 year	61	39	0
1-3 years	40	56	5
Over 3 years	26	45	29
Size of aid program			
Under 300 applicants	68	32	0
300-1000 applicants	29	61	10
Over 1000 applicants	13	47	40
Type of position			
Full-time	25	54	21
Part-time, alone	73	27	0
Part-time, with other staff	16	68	16
Responsible for aid policy			
Primarily	34	49	18
Partially	42	50	8
All respondents	37	48	15

*Professional levels are defined in terms of number of activities checked in question 12: Low = 3 or less; Medium = 4 to 6; High = 7 or more.

Table 18. Percentage of aid officers who rate various methods of professional development as "very important"--by type of institution and within a select group of professional leaders

Method of development	Type of institution			All respondents	Professional leaders*
	Private	Public 4-year	Public 2-year		
State meeting	43%	60%	64%	55%	67%
Regional meeting	51	60	60	56	63
National meeting	20	13	10	14	33
National office (Exec. Secy.)	26	23	21	23	37
Code of ethical standards	63	49	29	44	50
Journal devoted to aid	46	53	48	47	57
Recommended set of credentials for aid officers	31	44	26	31	50
Graduate training programs	29	44	38	35	43
Additional workshops	60	42	71	60	37

*Respondents who checked at least 7 professional activities in question 12.

Table 19. Percentage of aid officers who rate various potential functions of a national office as "very important"--by type of institution and within a select group of professional leaders

Function	Type of institution		All respondents	Professional leaders*
	Private	Public		
Testify on federal bills	86%	84%	81%	87%
Report Washington activities	62	70	63	80
Represent the aid profession	65	56	68	70
Operate employment clearinghouse	5	12	10	3
Liaison with other professions	8	12	14	13
Advance professional development	43	40	48	63
Organize training activities	41	49	51	47

*Respondents who checked at least 7 professional activities in question 12.

Table 20. Percentage of aid officers who judge the development of various service and ethical standards as "very important"--by type of institution and within a select group of professional leaders

Service or ethical standard	Type of institution			All respondents	Professional leaders*
	Private	Public 4-year	Public 2-year		
Professional relationships	27%	40%	29%	30%	43%
Responsibility to students	95	95	90	93	90
Responsibility to the college	73	63	69	69	73
Relations with schools	22	42	26	28	60
Providing public information	24	40	43	35	63
Confidentiality of records	54	74	74	67	73
Relationships with donors	43	28	48	42	40

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Survey Respondents*Alaska

Anchorage Community College

Arizona

Arizona State University
 Arizona Western College
 Grand Canyon College
 Northern Arizona University
 Prescott College

California

Azusa Pacific College
 Bakersfield College
 Bethany Bible College
 California College of Arts
 and Crafts
 California Concordia College
 California State College,
 Dominguez Hills
 California State College,
 Hayward
 California State College,
 Los Angeles
 California State College,
 San Bernardino
 California State Polytechnic
 College
 Chabot College
 Chaffey College
 Chapman College
 Claremont Men's College
 College of Marin
 College of the Desert
 College of the Redwoods
 College of the Siskiyous
 Contra Costa College
 Diablo Valley College
 Fullerton Junior College
 Hartnell College
 Humboldt State College
 Humphrey's College

Los Angeles Pierce College
 Loma Linda University
 Marymount College of
 Palos Verdes
 Menlo College
 Merced Community College
 Occidental College
 Palo Verde College
 Pepperdine College
 Pitzer College
 Pomona College
 Reedley College
 Rio Hondo Junior College
 Sacramento State College
 Saint Patrick's College
 San Diego City College
 San Fernando Valley State
 College
 San Francisco State College
 San Jose Bible College
 San Jose City College
 Santa Monica College
 Santa Rosa Junior College
 Scripps College
 Sonoma State College
 Southwestern College
 Stanford University
 Stanislaus State College
 Tahoe College
 United States International
 University
 University of California,
 Berkeley
 University of California,
 Davis
 University of California,
 Irvine
 University of Judaism
 University of San Diego,
 College for Men
 Victor Valley College
 West Coast University
 West Hills College

*A few questionnaires were received too late to be used.

Survey Respondents*Colorado

Adams State College
 Arapahoe Community College
 Colorado Mountain College
 Colorado State University
 Community College of Denver
 Loretto Heights College
 Saint Thomas Seminary
 Southern Colorado State College
 Temple Buell College
 University of Colorado,
 Colorado Springs Center
 University of Northern Colorado
 Western State College of
 Colorado

Hawaii

Kauai Community College
 Leeward Community College
 University of Hawaii

Idaho

Idaho State University
 Lewis-Clark Normal School
 North Idaho Junior College
 Northwest Nazarene College
 Ricks College
 University of Idaho

Montana

Carroll College
 Eastern Montana College
 Flathead Valley Community College
 Montana State University
 Northern Montana College
 University of Montana

Nevada

University of Nevada, Las Vegas
 University of Nevada, Reno

Oregon

Clackamas Community College
 Clatsop Community College

Concordia College
 Eastern Oregon College
 George Fox College
 Lane Community College
 Lewis and Clark College
 Mount Angel College
 Museum Art School
 Oregon State University
 Portland Community College
 Southern Oregon College
 Treasure Valley Community
 College
 Willamette University

Utah

Southern Utah State College
 University of Utah
 Weber State College
 Westminster College

Washington

Big Bend Community College
 Edmonds Community College
 Fort Wright College of the
 Holy Names
 Olympic Community College
 Peninsula College
 Shoreline Community College
 Skagit Valley College
 Tacoma Community College
 University of Washington
 Walla Walla College
 Walla Walla Community College
 Washington State University
 Western Washington State
 College

Wyoming

Casper College
 Sheridan College
 University of Wyoming

*A few questionnaires were received too late to be used.

Higher Education Surveys

Name _____ Institution _____

DIRECTIONS: These questions should be answered by the individual who assumes day-to-day operational responsibility for the administration of Financial Aid on your campus. Please answer each question if at all possible. Give the best judgment you can and, if you wish, explain any answer in the "comment" space on the back. Call collect 415 - 328-6150 to clarify any question. Please return by October 22.

<p>1 How long have you worked in Financial Aid? Years _____ Months _____</p>	<p>6 What is the nature of your responsibility in determining aid policies on your campus?</p> <p>Primarily responsible () Partially responsible. : () Slightly responsible ()</p>	<p>10 In what ways do you prefer to keep current? Assume all are available, and check those you would likely use.</p> <p>Occasional coursework () Workshop (2-4 days) () Professional meetings () Professional journals () Summer institute (2-4 weeks) () Self-study materials ()</p>																																																																																				
<p>2 Approximately how many Aid applicants does your office handle in a year? _____</p>	<p>7 In your judgment, what areas of academic preparation would be especially useful for Aid Officers? In which have you taken formal courses?</p> <table style="width:100%; border: none;"> <tr> <td></td> <td style="text-align: center;">Very Useful</td> <td style="text-align: center;">I Had A Course</td> </tr> <tr> <td>Data Processing</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>History & Philosophy of Financial Aid ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Accounting</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Statistics</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>School Law</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Need Analysis</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Finance & Taxation ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Counseling</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Research Methods ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Aid Administration ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Other (Explain over)..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> </table>		Very Useful	I Had A Course	Data Processing	()	()	History & Philosophy of Financial Aid ..	()	()	Accounting	()	()	Statistics	()	()	School Law	()	()	Need Analysis	()	()	Finance & Taxation ..	()	()	Counseling	()	()	Research Methods ...	()	()	Aid Administration ..	()	()	Other (Explain over)..	()	()	<p>11 Check the most useful topics for inclusion in workshops - (A) to train new Aid Officers, and (B) to keep experienced officers current. (Mark both columns.)</p> <table style="width:100%; border: none;"> <tr> <td></td> <td style="text-align: center;">(A) New Officers</td> <td style="text-align: center;">(B) Old Hands</td> </tr> <tr> <td>Office procedures ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Research methods ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Trends in education ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Preparing reports ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Economic trends ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Record systems ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Research findings ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Status of Aid bills ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Interview techniques ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Recent Aid literature</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Major Aid programs ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Need analyses ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Data Processing</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Personnel Administration</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Minority/poverty issues</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> </table>		(A) New Officers	(B) Old Hands	Office procedures ...	()	()	Research methods ...	()	()	Trends in education ..	()	()	Preparing reports ...	()	()	Economic trends ...	()	()	Record systems ...	()	()	Research findings ...	()	()	Status of Aid bills ...	()	()	Interview techniques ..	()	()	Recent Aid literature	()	()	Major Aid programs ...	()	()	Need analyses ...	()	()	Data Processing	()	()	Personnel Administration	()	()	Minority/poverty issues	()	()
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<p>3 What was your major responsibility one year ago?</p> <p>At this college:</p> <p>Same position as now () Another position in Aid work ... () Another position on campus ()</p> <p>At another college:</p> <p>Position in Aid () Another position ()</p> <p>Student only () None of above ()</p>	<p>8 What types of information for job orientation are desirable for New Aid Officers? Which did you have?</p> <table style="width:100%; border: none;"> <tr> <td></td> <td style="text-align: center;">Desirable</td> <td style="text-align: center;">I Had</td> </tr> <tr> <td>Job Responsibilities ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Limits of Authority ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Institutional Policies ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Office Administration ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Overview of Yearly Work</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Program Procedures ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Minority/Poverty Issues</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Relations with Other Offices</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Procedures Manual ...</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> </table>		Desirable	I Had	Job Responsibilities ...	()	()	Limits of Authority ...	()	()	Institutional Policies ..	()	()	Office Administration ..	()	()	Overview of Yearly Work	()	()	Program Procedures ...	()	()	Minority/Poverty Issues	()	()	Relations with Other Offices	()	()	Procedures Manual ...	()	()	<p>12 Check each that you have done.</p> <p>Read Aid newsletters regularly () Attend Aid association meetings ... () Participated in Aid meeting (read paper, led discussion) () Follow progress of Aid bills () Read "Chronicle of Higher Education" or "Higher Education and National Affairs" () Attended ACAC, AACRAO, or APGA () Committee work for Aid assoc () Published article on Aid () Served as consultant off-campus () Held office in Aid association ()</p>																																																						
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<p>4 Which best describes your present position?</p> <p>Primarily Aid Administration () Part-time Aid Administration with Aid professionals under me () Part-time Aid Administration with no other Aid professionals in this office ()</p>	<p>9 Ideally, what is the best way for new Aid Officers to get practical experience? (Check one)</p> <p>Internship () 2-4 week summer institute () On-job training is sufficient ()</p>																																																																																					
<p>5 To support professional development of Aid Officers, does your institution provide released time and pay expenses for the following? (Check if yes)</p> <table style="width:100%; border: none;"> <tr> <td></td> <td style="text-align: center;">Release Time</td> <td style="text-align: center;">Pay Expenses</td> </tr> <tr> <td>Meetings within state ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Meetings out-of-state ..</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Coursework related to job</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Outside professional activities</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Attendance at workshops</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> <tr> <td>Office subscriptions</td> <td style="text-align: center;">()</td> <td style="text-align: center;">()</td> </tr> </table>		Release Time	Pay Expenses	Meetings within state ..	()	()	Meetings out-of-state ..	()	()	Coursework related to job	()	()	Outside professional activities	()	()	Attendance at workshops	()	()	Office subscriptions	()	()																																																																	
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In the next 3 questions rate each alternative: 1-Very Important, 2-Important, 3-Not So Important

13 In developing the Financial Aid profession, how important do you rate each of the following?

Rate each: 1, 2, or 3.

- State Meeting ()
- Regional Meeting ()
- National Meeting ()
- National Office (Exec. Secy.) ()
- Code of ethical standards ()
- Journal devoted to Aid ()
- Recommended set of credentials for Aid Officers ()
- Graduate training programs ()
- Additional workshops ()

14 If there were a national office (Executive Secretary), how important do you rate each of the following functions?

Rate each: 1, 2, or 3.

- Testify on federal bills ()
- Report Washington activities ()
- Represent the Aid profession ()
- Operate employment clearinghouse ()
- Liaison with other professions ()
- Advance professional development ()
- Organize training activities ()

15 The following issues concern professional service and ethics. Which most need discussion and standards?

Rate each: 1, 2, or 3.

- Professional relationships ()
- Responsibility to students ()
- Responsibility to the college ()
- Relations with schools ()
- Providing public information ()
- Confidentiality of records ()
- Relationships with donors ()

16 In your judgment what is the single most needed step in furthering the professional development of Financial Aid Administrators?

COMMENTS: Use this space to explain any answer

Use prepaid envelope provided — Return to:

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