

FINANCIAL AID ADMINISTRATORS – WHO ARE THEY AND WHAT ARE THEIR TRAINING NEEDS?

by *Matthew S. Galvez and Arlene Olinsky*

The New York State Higher Education Services Corporation (NYSHESC) and the New York State Financial Aid Administrators Association (NYSFAAA), in conjunction with the Federal State Student Financial Aid Training Program (SSFATP), recently completed analysis of a training needs survey of financial aid administrators in New York State. The survey was the first of its kind in the state, designed to identify financial aid administration strengths and weaknesses specific to New York. The following is a summary of the survey highlights.

The survey questionnaire was distributed August 1978 by the New York State SSFATP Steering Committee.¹ Survey questions² were focused on both the working environment and the training needs of the State's financial aid community. From the 748 questionnaires mailed, 405 responses were received, giving a response rate of slightly over 50% for all sectors (public colleges, independent colleges and non-degree schools). A more detailed analysis of these survey results specifically identifies training needs, and is currently being used to direct SSFATP program planning toward increasing the proficiency of New York's financial aid administrators.



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¹Steering Committee membership: Eileen D. Dickinson, Michael P. Cruskie (until July 1979) and Peter J. Keitel (as of July 1979) representing the New York State Higher Education Services Corporation; Micheileen Doran of Marymount College, John Reeves (until July 1979, when he joined the New Jersey Department of Higher Education) and Donald Moore of the State University of New York at Oneonta (as of July 1979) representing the New York State Financial Administrators Association; Walter Hannahs representing the State Education Department, and Anthony Bellia, from Canisius College, representing HESC's Advisory Council.

²The questionnaire was developed by Cynthia Bailey of the Polytechnic Institute of New York. Some of the questions relating to demographic and background information were similar to those investigated in "Characteristics and Attitudes of the Financial Aid Administrator - a Report on the Survey of the Profession in 1977", published by the National Association of Student Financial Aid Administrators (NASFAA) in 1978.

Survey results were compiled and analyzed using a Burroughs 6800 computer and the "Basis/Basis" statistical software package. Medians were calculated using non-parametric methods. Confidence intervals and CHI-square values were obtained directly. The analysis is divided into the following categories:

1. Profile of Respondents
2. Training Needs
3. Salaries
4. Job Related Characteristics
5. Outside Conferences Attended and Evaluated
6. Office Characteristics

RESULTS

1. *Profile of Respondents*

The respondent characteristics for the New York Survey differed markedly from the national findings reported in "Characteristics and Attitudes of the Financial Aid Administrators - A Report on the Survey of the Profession in 1977," published by NASFAA in 1978. Fifty-two percent of respondents identify themselves as "Director", as compared with 75% nationally. The median age reported was 35, slightly younger than the national median of 38. New York State respondents were divided almost equally by sex (52% male - 48% females) whereas the NASFAA study indicated only 33% female.

An investigation of ethnic background reveals that nine out of every ten respondents were white, 7% were black and under 1% were Hispanic. Whites reported a median income of \$15,890, 16% higher than the median for blacks which was \$13,670. Only six respondents indicated Hispanic background, and their median salary was \$16,000, the highest reported.

While 96% of the respondents indicated they are 12-month calendar year employees, New York financial aid administrators are less likely than their national counterparts to spend the majority of their time in financial aid. Only 69% indicated that at least three-quarters of their time is devoted to financial aid, as compared with 77% for the national survey respondents. The results indicated that median salary increases as the percent employment time devoted to financial aid decreases.

The New York financial aid officer is generally less experienced than his national counterpart, with median experience reported at 4.6 years, as compared with a national median of 6 years.

Over nine out of ten respondents indicate they hold a bachelor's degree or higher, and 80% stated that their undergraduate or graduate education did *not* include coursework in financial aid. This finding implies that interest in financial aid continuing education programs may exist.

The responses to questions regarding tenure, multi-year contract and paid sabbaticals show rather low levels of job security among financial aid professionals in New York State; about 75% of the respondents do not receive these benefits.

2. *Training Needs*

Respondents were requested to indicate high, medium or low interest in each of 27 training categories. The most important training needs were:

1. Compliance with (State, Federal) Regulations (71.9%)³

³Reported as a percentage of those indicating a "high interest" in each category.

2. Office Management (61.5%)
3. Administering the BEOG Program (60.9%)
4. Communicating the Needs of the Financial Aid Office or the Needs of the Students Internally (59.4%)
5. Development of Internal Financial Aid Application and Delivery System (59.1%)
6. Financial Aid Counseling (57.6%)
7. Administering the Federal CWS Program (55.7%)
8. Administering Institutional Aid (55.0%)
9. Administering the Federal NDSL Program (54.3%)
10. Developing Financial Aid Management Information Systems (52.6%)

Most respondents preferred concentrated workshops as a training mode. Their second choice was a reference manual or a mentor. These choices were relatively constant regardless of training needs or school type.

3. Salaries

The median salary for all survey respondents was \$16,570, with the public sector generally reporting higher salaries than degree-granting private or proprietary schools. Salaries at senior colleges of the City University of New York (CUNY) were highest (\$20,500), followed by community colleges of the State University of New York (SUNY), (\$17,000), SUNY state-operated colleges (\$16,700), independent four-year schools (\$15,700), CUNY community colleges (\$15,000), degree-granting business/trade and hospital schools (\$13,000) and lastly, independent two-year schools (\$11,800). The median salary at non-degree hospital schools was relatively high (\$19,300), while at non-degree business/trade schools it was relatively low (\$12,900).

In almost all cases, men received higher median salaries than women (a median of \$17,630 for males vs. \$13,500 for females, a 31% differential) regardless of school type, experience level or title.

As would be expected, Directors of Financial Aid had the highest median salary (\$17,400), followed by Assistant/Associate Directors (\$14,800), and FA Officer/Advisors (\$12,900).

There was a significant interaction between salary and experience. At most school types, median salary increased with years of experience up to 10 years, then appeared to level off. The only exception was at independent four-year schools where income continued to increase at the higher experience levels.

A slight majority (51%) of respondents were not satisfied with their salaries. Directors had a 51% dissatisfaction rate with their salaries, while Financial Aid Counselor/Advisors had a 56% dissatisfaction rate. A high level of satisfaction was generally correlated with a relatively high salary level; however, this was applicable to only 18% of the respondents.

4. Job Related Characteristics

The majority of respondents felt they had the skills necessary for effective job execution, with the highest degree of self-confidence evident in the public sector (nearly 100%). This result could be related to several factors. Most respondents (70%) were members of the New York State Financial Aid Administrators Association (NYSFAAA) and 58% held at least a master's degree. While the level of

college degree did not positively correlate to having the perceived skills necessary to do the job effectively, higher degrees (especially master's) were reported to contain a higher proportion of financial aid coursework. This in turn leads to greater perceived confidence.

Three-quarters of all respondents at least moderately agreed that they are recognized by others in their institution as holding an important position regardless of their salary. These results varied *inversely* with the percentage of employment time devoted to financial aid. Of those devoting all of their time to financial aid, 67% agreed to high recognition, while 97% of those who spent less than 25% of their time in FA held the same opinion.

A number of factors affect life time career satisfaction with financial aid. Sixty-eight percent (68%) of all respondents at least moderately agreed that financial aid would be sufficiently satisfying to be a lifetime career, regardless of title.

School type did affect lifetime career satisfaction. While respondents at SUNY, independent four-year schools and degree granting business/trade/hospital schools felt it could be a lifetime career, conclusive results were not obtained for CUNY, independent two-year and non-degree schools. Among the latter categories, more dissatisfaction was indicated, as well as a greater variance in responses.

Career satisfaction was affected by age. Twenty to thirty year old respondents stated they would generally not be satisfied with a lifetime career in financial aid, but those who were 31 or older generally felt they would be satisfied. Among respondents who were 60 or older, some indecision was again evident.

Finally, satisfaction with financial aid as a lifetime career was correlated to the amount of time devoted to financial aid. As the proportion of employment time devoted to financial aid increased, lifetime career satisfaction increased.

5. Outside Conferences Attended and Evaluated

Directors and Assistant/Associate Directors reported more paid released time to attend workshops than FA officers/advisors. Most institution types provided paid released time for BEOG Workshops (78%) and New York State Tuition Assistance Program (TAP) Workshops (72%). CUNY senior and community colleges, and non-degree hospital schools usually would not pay expenses for outside conferences.

All of the training workshops cited in the survey were considered valuable by the majority of attendees and were reported to increase their proficiency. These were (1) College Scholarship Services Computation School, (2) NYSFAAA Summer Workshop, (3) BEOG Workshop, and (4) Higher Education Services Corporation Guaranteed Student Loan (GSL) Workshop. The most popular workshop was the BEOG Workshop (attended by 69% of the respondents), followed by the TAP Workshop (59%), CSS Computational School (36%), NYSFAAA Workshop (35%) and the GSL Workshop (31%). The results of this section indicate that the workshop was considered an effective training method for financial aid administrators, and its use should be continued in training both novice and more advanced financial aid administrators.

6. Office Characteristics

As expected, the financial aid offices in public institutions generally process more students and have larger staffs than do private colleges and universities.

Each public sector school was characterized by professional staff of three or more people, substantial clerical staffs, and many student assistants. Despite their larger staff size, the public schools usually reported a need for additional staff in all categories. CUNY senior and community colleges had the largest staffs, with an average of six financial aid professionals per school but still reported a need for one to two more. The present caseload for CUNY schools is 700 students (1,400 for CUNY community colleges) per staff member. SUNY schools reported an average of three professional staff members and a need for one more. The current SUNY caseload is almost 1000 per professional staff member. Independent colleges and universities usually had between two and three financial aid professionals, and they handled about 400 cases per staff member.

Conclusions

The results of the 1978 survey will be used to guide New York State SSFAT policy. The primary goal of SSFAT is to increase the proficiency of postsecondary school and state agency financial aid officers, and therefore the information obtained from this survey is being incorporated into plans for future SSFAT activities. Subjects reported as top training needs will be addressed by workshops, a training manual, research papers contracted under SSFAT funding, audiovisual presentations and the introduction of training modules. The effectiveness of these materials and methods will then be evaluated by both trainers and trainees, as well as by the SSFAT Steering Committee; this should engender an ongoing process of updating and improvement.

To ensure that information utilized is current, a follow-up survey is anticipated to evaluate the effect of the Middle Income Student Assistance Act (MISAA).

The New York State Higher Education Services Corporation would be able to assist other state agencies in the development of a similar survey and in production of a computer-based analysis. Inquiries and requests for copies of the complete New York survey analysis report can be obtained by contacting: Charles G. Treadwell, Vice-President for Research and Policy Analysis, New York State Higher Education Services Corporation, Twin Towers - 14th Floor, 99 Washington Avenue, Albany, New York 12255.