

## Competencies and Training Needs of Financial Aid Administrators

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*The purpose of this research was to: 1) identify the competencies considered essential for entry-level administrators of financial aid at four-year universities, and 2) determine what method of training leads to these competencies according to financial aid directors. A Computer-based Delphi process was implemented because of its flexibility and adaptability.*

Keywords: Competencies, Delphi technique, Professional Development

### Problem Statement

The financial aid profession is in a continuous state of evolution due to advances in technology and changes in legislation. Consequently, as more and more programs and technological advances are introduced to student financial aid administration, there is greater demand for effective, efficient and skilled professionals to administer and develop successful financial aid programs. There is also an overwhelming need for advanced and limited training opportunities as shown in a search of the relevant literature. Currently, there is no consensus concerning the competencies that financial aid administrators need or the preferred method of obtaining those skills.

The creation of identifiable competency requirements gains importance as the career expectations of the financial aid administrator increase. The continually evolving financial aid arena is a direct result in changing laws, developing regulations and the introduction of new aid programs. Therefore, research needs to be conducted to establish which competencies are considered appropriate and the most appropriate form of training to develop these competencies.

### Theoretical Framework

The creation of the National Defense Education Act in the late 1950's brought about a national commitment to a higher educational system that could service a growing technologically advancing society. Certain developments such as the G.I. Bill in 1944 spurred student aid policy during the *national economy* era from the end of World War II to the mid 1960's. Significant increases in Federal expenditures for student aid began in 1972, again making the role of the institutional aid administrator even more important than it had been in the past (National Association of Student Financial Aid Administrators [NASFAA]), 1978. A NASFAA commissioned report in 1977 had its findings published in 1978 under the title Characteristics and Attitudes of the Financial Aid Administrator, became the groundwork study identifying early characteristics or competencies of administrators of student financial aid. This report surveyed financial aid directors with the purpose of analyzing staff background, academic achievement, job orientation, professional competence, degree of professionalism, needed professional development and aid office characteristics.

Utilizing this foundational study in the financial aid arena as a basis for research, answers to the question of competencies of the financial aid administrator can be sought. Parry (1996) describes competency as "a cluster of related knowledge, skills and attitudes that affects a major part of one's job (a role or responsibility), that correlates with performance on the job, that can be measured against well-accepted standards, and that can be improved via training and development." (p.50).

Prerequisite to the establishment of any form of meaningful training, there is a need to identify the competencies required and their corresponding level of importance for financial aid administrators. In their presentation to the 1979 ASTD National Conference, Ashely and Stump stated that:

"A variety of skills and abilities developed through both work and non-work experiences are needed by workers in order to enter and progress in a rapidly changing world or work. Additionally, individuals need to develop their occupational adaptability and flexibility to enable them to deal effectively with the increasing number of career and job changes that are characteristic of the current labor force" (p. 71).

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In a paper presented to the Academy of Human Resource Development Conference in 2002, Charlotte Nitardy and Gary McLean state that competencies are commonly considered by organizations to help guide human resource development and in making human resource decisions. They built this conclusion from several existing definitions of competence. Ayer and Duncan were cited for their 1998 expansion of the definition of competency as a specific, observable behavior or characteristic that leads to superior performance. Finally, personal competencies are people interaction skills. McLagan (1996) indicated that a competency model could be used as a decision tool to describe the key capabilities for performing a specific job. They are more reliable than job descriptions, more valid than skill lists, and more on target than gut feelings. Utilizing the results of the previously stated literature as a basis, a more coherent and comprehensive understanding of specific competencies required of an administrator in the field of financial aid can be developed.

In the infancy of the financial aid profession, authors have documented the need for increased professionalism among the aid administrators. The National Association of Student Financial Aid Administrators (NASFAA) established in 1974 the professional standards of practice, which laid the foundation for the standards that are followed today. Additional research was conducted to identify the general competencies for financial aid practice (Moore, 1975, p.10) and the activities and professional characteristics of aid administrators (Morris, 1976, p.25, Flippin, 1979, p.143, Schiesz, 1974, p.30). Some of the first studies to identify professional development needs were conducted by Flippin (1979) and Willingham (1970). They queried directors of financial aid and concluded that the professional development needs included attendance at state and regional professional organization meetings, availability of professional journals, a code of ethical standards and increased availability of training opportunities.

The Journal of Student Financial Aid reported in 1988 that as a conclusion of the study conducted by Robbins and Phillippe, there was noticeable role ambiguity and conflict within financial aid administrators in the execution of their duties. Their findings indicated that there was a significant difference between the actual and desired role of the financial aid administrator for the twenty-two role functions included in the study. Student recruitment, personnel evaluation and administration of state financial aid programs were the functions that had the highest level of concern by the respondents. They suggested that a study should be conducted to determine courses or workshops that could be instituted to lessen the gap between actual and desired role functions. McDougal (1983) added that there is an increasing need for student financial aid personnel at all levels to be more aware of and familiar with sound counseling techniques and the advising role. The financial aid administrator is required to go beyond needs analysis, administrative trivia and paperwork to focus attention on an important issue- the student.

Taylor and Shelley (1992) suggest that by identifying important tasks required of the entering financial aid administrator an institution can save valuable time and money when selecting the candidate with the best fit for the position. They proposed that the new administrator possess seven key skills; counseling, communication, computer expertise, management (programs, people, and operations), packaging (as in “experience with packaging and awarding aid”), counseling (advising students and parents) and communications (speak, write and listening).

The changing environment of student aid has some technological implications to the financial aid administrator. Craig Cornell (2000) emphasized that the financial aid industry must adjust for the technology surge at the Department of Education, increased use of internet technology in the business sector, increasingly sophisticated mainframe systems and enrollment management paradigms (p.38). As a result of these changes he suggests that to ensure competitiveness the financial aid office should develop hiring and training programs by examining staffing patterns and considering staff reorganization.

Vali Heist stated in his 2002 NASFAA Student Aid Transcript article what he considered to be the top ten “in-demand” job skills for a financial aid administrator and they are as follows:

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|--|-------------------------------------|
| 1. Problem solving or critical thinking  | 5. Information management skills    |
| 2. Human relations to include interpersonal skills, communication skills and people skills | 6. Money management skills          |
| 3. Computer programming and software utilization   | 7. Business management skills       |
| 4. Teaching and training skills  | 8. Science and math skill           |
|  | 9. Foreign language                 |
|  | 10. Vocational and technical skills |

## Methodology

Invitations to participate in this study were initially sent to the 23 committee chairs and board members of the Southwestern Association of Student Financial Aid Administrators (SWASFAA) that represented universities. These invitees were considered to be experts with extensive experience and knowledge in the area of financial aid.

The credentials of the panel support Moore's (1987) criteria for an expert panel member. He states that an expert is an "individual who possesses the knowledge or experience necessary to participate in a Delphi" (p.51). The membership of the Delphi expert panel was subsequently formed from the 18 SWASFAA leaders who accepted the invitation to participate and was considered well within the recommendations of Murray and Hammonds (1995) where they indicated that the panel should be comprised of at least 10 members. Wilhelm (2001) also believes that a panel of this size is appropriate by supporting Linstone and Turoff 's (1975) early observations of Delphi panels in which they suggest a panel of 10-15 members.

The Delphi technique was selected as the preferred methodology for this study. The Delphi distinguishes itself from other group interaction methods such as the Nominal Group Technique by three important characteristics. Those features are (1) anonymous group interaction and responses, (2) multiple iterations or rounds of questionnaires or other means of data collection with researcher controlled statistical group responses and feedback and (3) presentation of statistical group responses (Murray and Hammonds, 1995, p. 424). Olaf Helmer and Norman Dalkey developed this procedure in the early 1950's as researchers with the Rand Corporation. The initial purpose of this process was to gather expert opinion and develop consensus in forecasting war scenarios and as explained by Helmer (1983) is "to make the best use of a group of experts in obtaining answers to questions requiring reliance, at least in part, on the informed intuitive opinions of specialist in the area of inquiry"(p. 134). Murry and Hammonds (1995) believe that the:

"Delphi method rests on two assumptions. One is the assumption that group decisions are usually more valid than decision made by a single person. Further, decisions are more valid if the group is comprised of experts in the field (Brooks 1971; Langford 1972; Martino 1983). A second assumption is that, while group decision making can be more reliable, numerous problems can arise when group members meet face to face" (p.426).

In Round One an electronically mailed questionnaire was sent to the expert panelists with the dual purpose of surveying the preferred method of training and soliciting ten competencies deemed essential for an entry level financial aid administrator. Somers, Baker and Isbell (1984) state "the first round is designed to elicit individual judgments or opinions from each of the panel of experts" (p.28). Utilizing the recommendations and designs of Dillman (2000), the electronic surveys were considered to be similar to other acceptable forms of surveying. An advantage noted by Thach (1995, p.31) in the utilization of electronic notifications was that respondents may provide more candid results due to the isolation of their answers. In response to the initial questionnaire, the panelists submitted 180 essential competencies which were condensed because of duplication to 84 essential competencies. These competencies were then categorized into seven defined areas. The categories were developed using the constant comparison method which was developed by Barney Glasser and Anselm Strauss (Strauss & Corbin, 1990). Each Round One competency response was written on a note card with no reference to the contributing respondent. The competencies were then separated into stacks of like responses and information considered useless or redundant was deleted. Competencies were compared until emergent categories were solidly identified. The meaning of each category was clarified until sharp distinctions were determined and the most important categories were established for the study (Gall, et al, 1996). The final result was 84 competencies organized in seven categories. The identified categories were: Leadership, Fiscal Management, Personnel Management, Communication, Professional Development, Technical Processes and Assessment, and Student Contact/Customer Service. The 84 competencies once organized by category, were presented to the expert panel on an electronic questionnaire in Round Two.

In Round Two, panelists were instructed to rate each essential competency on a four point Likert scale from 4 (Strongly Agree) to 1 (Strongly Disagree). Those not wishing to rate the competency were afforded the opportunity to select the rating of "Undecided" which had a value of 0. Respondents were provided sections to submit comments to support or clarify their ratings. Round Two results were electronically stored and later tabulated to assist in the production of statistical and narrative data utilized in the development of Round Three. Seventy of the original eighty-four competencies achieved a mean rating of greater than or equal to 3 (Agree) and were retained in the development of Round Three. The fourteen competencies that had a mean rating of less than 3 were removed from the study.

Round Three allowed the panelists to review and possibly re-rate the seventy remaining essential competencies presented from Round Two. The electronic survey in Round Three provided the results of the Round Two analysis which included the panel's Interquartile Range (IQR) for each competency, the individual respondents rating and comments for each section. Panelists were instructed that they could reevaluate their rating in light of the new data and any comments or let their previous rating stand. They were also directed to provide comments concerning their rating, particularly if this rating was outside the IQR.

Each essential competency identified by the Delphi panel was graphically displayed on a Summary Analysis Sheet. This analysis consists of the essential competency, identified by the category, for Rounds Two and Three, there is a graphic display of the frequency of distribution, the means and the IQR. The data generated by the rounds also included the experience and education level of each respondent, other sources of financial aid training used in the development of financial aid skills and knowledge, competencies required for the field, method of training delivery and importance of identified competencies.

## Results and Findings

The essential competencies of an entry level financial aid administrator were identified utilizing a computer-based Delphi process. There were 84 essential competencies initially identified in response to Research Question One: What are the professional competencies are required for an entry level financial aid administrator to possess or obtain during the first year of employment?

Data analysis of the responses to the first question indicated that at the conclusion of Round Three, 67 of the essential competencies were rated as 4 (Strongly Agree) or 3 (Agree) by at least 75 percent of the Delphi panel.

Category I or Leadership consisted of essential competencies that provide a basis for leadership or followership. These skills encompass decision-making, time management, planning, quality of work and organizational behavior. The panel indicated that the most significant competency for this category was the ability to assume responsibility with a ranking of number 4. This reflects the need in the financial aid industry to identify young professionals that will be accountable for their actions. The ability to multi-task was also ranked among the top 10 competencies at number 8. Considering the complexity of the financial aid industry, the entry level professional must be able to manage many projects at the same time. It is very common for the financial aid professional to be involved in personal advising of a student and family, sit on a board or committee for a professional organization, be a member of an institutional functional group and oversee the completion of financial aid applications and files. A sense of humor, a sense of urgency, the ability to prioritize work loads, flexibility in a changing environment and the ability to set priorities were all considered by the panel to be of equal rank at 12 and were within the top 20 competencies. These competencies are an indication that the well rounded employee is extremely desirable. The Directors indicated that they desire an employee that is pleasant to work with and can be trusted to complete all projects assigned and within prescribed deadlines.

Fiscal Management or Category II was comprised of competencies required in the operations of financial aid awards and cash management. The competencies for Fiscal Management received ratings that were considered very low and as a result none were within the top 20. One competency, possess basic mathematical competency, was ranked at 28. This indicates that the respondents did have some value for this competency but did not consider it to be among the most important traits for an entry level employee. The basic understanding of Federal, State and local cash management regulations concerning financial aid was ranked at the bottom at 64<sup>th</sup>. This would indicate that the respondents believe this to be a higher level skill and necessary only for the advanced financial aid administrator. Generally, this competency is not required of financial aid administrators until they have reached the senior administrator or director level.

Category III or Personnel Management includes competencies required in promoting cooperative working relationships with staff, students and faculty. There were no traits in this category that were rated within the top 10. However, there were six competencies ranked between 21 and 28 in significance. These competencies included sensitivity to others needs, willing to accept constructive criticism, discretion with personal matters, ability to seek assistance, ability to work with peers and the ability to work with a diverse population.

The next category, Communication (Category IV) focuses on those skills and competencies required for the transfer of information. The communications category received only three competencies considered significant by the expert panel in Round One. The possession of listening skills was considered extremely significant by the panel as indicted by the ranking at number 4. Considering the counseling demands on the new financial aid administrator when working with faculty, staff, students and parents, this trait is critical in the awarding of accurate and timely financial aid. Financial aid administrators, in their first year of employment, will be engaged daily in listening to students and parents with their special circumstances and how those circumstances affect student aid eligibility. The possession of writing skills was ranked number 21. This mid level ranking would indicate that the panel believes this to be a significant trait but one that should be developed after the initial competencies have been refined.

The competencies required for the development and retooling of skills to effect continued professional growth and productivity were listed in Category V or Professional Development. Integrity and ethics were the number 1 and 2 competencies ranked by the expert panel in this study. This ranking is a significant indication that directors must be able to trust entry level financial aid administrators as they work autonomously. Considering the high

demands of the office and sometimes minimal staffing levels, entry level financial aid administrators are allowed to work independently within two to three months after employment. Directors must have a level of confidence in their employees that they will perform their duties with integrity and ethically and minimal supervision. The competency of patience, assumption of responsibility for action and the projection of a positive image for the department were ranked number 12.

Category VI or Technological Processes and Assessment consists of those competencies that cover the ability of the administrator to apply new technology into the financial aid process, to evaluate and analyze programs and processes, and to seek solutions. The panel indicated that the ability to ask questions was a significant trait and ranked it number 2. The financial aid industry is a very complex, regulation and policy driven industry and an entry level employee must be inquisitive enough to seek answers for any questions that may arise. It is imperative that the new professional know their limitations and ask questions of the more seasoned staff and government officials. The utilization of technological solutions was considered by the panel to be of low priority for the new employee and ranked those competencies number 50 to 59. This is considered a skill that the administrator would obtain as they progress in responsibilities and as their management duties increase.

The final category, Student Contact/Customer Service, Category VII contains the competencies required for the effective interaction with individuals seeking the services of the financial aid office. Entry level financial aid administrators are the “front line of defense” in the operations of the financial aid office. They are the employees that will have the maximum contact with the customers of the office and as such must have developed people skills. This category received high rankings by the panel as indicated by five of the eleven competencies receiving a ranking in the top 10. The experts believe that a new employee must enjoy working with people and should be able to listen to them and care about their circumstances. This belief is so strong that they ranked both of these competencies were ranked number 4. The panel also indicated that it is important for the new administrator to be able to maintain concern for the student and have a realistic academic expectation for the student to fulfill. This competency was ranked number 4 along with the ability to understand the concepts of customer service and to treat every customer as an individual. These rankings are indicative of the nature of the financial aid industry and its roots in the student affairs field, concern for the student and a true desire for student success by the school administrator.

The 67 essential competencies of financial aid administrators met the definition of consensus as prescribed in the study. Therefore, these competencies can be considered a representation of essential competencies required for an entry-level financial aid administrator to possess upon employment or to obtain within the first year of employment. The most significant of these competencies are integrity, ethics, ability to ask questions, enjoys working with people, the ability to listen and care, assuming responsibility, possessing listening skills, concern for the student’s success, ability to multi-task, understands customer service concepts and treats every customer as an individual.

The expert panel also provided in Round One the answer to Research Question Two, which was: What type of pre-service and/or in-service training do directors of financial aid consider useful for developing these competencies? Panelists were instructed to select five sources of training or instruction from the list provided on the instrument. Analyses of the top 5 responses are as follows:

1. The panelists unanimously selected on the job training in a financial aid position.
2. “Financial Aid Officer Workshops” presented by state or regional professional organizations was selected by 94.4% of the panel.
3. Mentoring from key organizational leaders received two-thirds or 66.7% of the panelist votes.
4. Decentralized training provided by the National Association of Student Financial Aid Administrators was indicated by 10 of the panelists, or 55.5%, as a top five method of information delivery.
5. Self-Study utilizing programs such as SFA Coach, the web-site LearnFinancialAid.org and pre-conference training seminars received equal votes at 8 or 44.4% each. Self-study programs are relatively new programs delivered by CD or by web-site and have not been widely promoted.

## **Conclusion and Recommendations**

The unanimous selection of “On the job training” by the panel is an indication that practice and tenure is considered the best method of preparation for entry-level financial aid administrators. As reported by Baier, this conclusion by the panel supports the dissertation results reported in 1977 by Patricia Eileen. Her study concluded that on-the-job

experience was one of the desired methods of development. Ferguson (1981) also supports these findings by stating that there was a need for in-service training for financial aid staff. Baier's 1985 report also supported these finding by indicating that there was support for on-the-job experiences in developing new professionals.

The following twelve competencies, listed in descending order, were judged significant by the expert panel and had a mean value greater than 3.5.

- |   |  |
|---|--|
| 1. Possesses high degree of integrity           | 7. Able to listen and care   |
| 2. Maintains ethical behavior in all activities | 8. Able to multi-task  |
| 3. Asks questions                               | 9. Maintains a concern for the students and a realistic expectation for the student to fulfill |
| 4. Assumes responsibility                       | 10. Understands the concepts of customer service   |
| 5. Possesses listening skills                   | 11. Treats every customer as an individual   |
| 6. Enjoys helping people                        |  |

From this list it can be determined that financial aid directors believe the most important competency or trait was "Possess high degree of integrity". Delworth and Yarris (1978) stated in their foundational study of student affairs that one of the four categories of competencies required of new student affairs professionals was ethical concerns. The findings are also supported by Osruth's 1981 study of competencies for entry level student affairs administrators, which included the appreciation and internalization of professional standards and ethics. Similarly, the indication of integrity and ethics is supported in part by the executive-level model presented by Alldredge and Nilan (2000, p.139) in which the number 1 competency listed in their study was a combination of ethics and integrity. Glenn and Engle (1993) support the training of integrity and ethics with their suggestion that there is minimal material on the human aspect of financial aid. Finally, Lovell and Kosten (2000) synthesized 30 years of research relating to successful student affairs administration and concluded that the administrator should possess the traits of personal integrity and cooperation among others.

The panel indicated that asking questions, the ability to multi-task, enjoys helping people and has concern for the students were significant competencies. These findings are supported by Taylor and Shelley (1992) who indicated that the entering financial aid administrator should possess seven key skills which included counseling, communications, and the management of programs, people and operations.

The expert panel came to the conclusion that listening was a desirable trait. This is support in part by Carpenter, Guido-DiBrito and Kelley (1981) when they stated that in the field of student affairs communications was a valuable talent. The findings of the panel also support the significance of communicating effectively as reported by Winston and Miller (1991). Taylor and Shelley (1992) suggested that the ability to speak, write and listen (communications) was one of seven key skills required of a potential candidate. The competencies identified by this study are elements that can be utilized to develop an individualized training program as recommended by McDade (1990).

As a result of this research it is recommended that the competencies identified in this study should be incorporated in the recruitment, selection and training of entry-level financial aid administrators. Hiring supervisors should develop from this list appropriate competency requirements, as they relate to their institution, for the position being filled. Upon employment, the new administrator should be placed in a personalized basic training program to develop the competencies not yet obtained. The competencies identified should also be utilized in the design and implementation personalized training programs for financial aid administrators currently in the industry. This training program would be utilized to develop more competent administrators and should be factored into the annual performance. Credentialing of financial aid professionals should also be examined with the goal of establishing required competencies and experience levels required for professional designation. Considering the current absence of consensus concerning the competencies that a financial aid administrator should possess, the competencies identified should be utilized to conduct presentations and training at State, Regional and National professional conferences with the target audience being the supervisors and managers of entry-level financial aid administrators. Such training should include the development and awareness of integrity, ethics, communication, student development and customer service. It is recommended that future financial aid training programs and courses incorporate the competencies in this study in the curriculum along with technical and regulatory subjects. The establishment of financial aid internships should be promoted due to the high percentage placed on "on-the-job training" by the Delphi panel. It is also recommended that current web-based training programs should be modified to implement the identified competencies not already included in the curriculum.

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