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Characteristics, Career Paths, and Training Needs of Financial Aid Employees in the WASFAA Region

by
Donald E. Hills

This article was re-written by the author from a presentation he made at the 1986 WASFAA Conference, and is based upon a survey of the WASFAA region financial aid offices taken in 1985. It shows wide variations in the demographic characteristics and backgrounds of student financial aid office employees, chiefly by job level.

This article presents findings from a survey which was commissioned in response to concern by the Western Association of Student Financial Aid Administrators (WASFAA) Minority Concerns Committee that the training needs of minority financial aid office employees in the WASFAA region have not been adequately met, and that those needs were perhaps different from the training needs of non-minority financial aid employees. As part of this effort, the Committee wanted to identify weaknesses in the training of minority staff members, and to learn about career paths of minority employees.

The survey was conducted in June and July of 1985, and collected data on three characteristics of respondents:

- The ethnicity and gender composition of financial aid office employees in the WASFAA region.
- Career paths of WASFAA financial aid office employees.
- The present level of training activity, employee perceptions regarding useful areas of training, and preferable methods of training.

This study is similar to the National Association of Student Financial Aid Administrators (NASFAA) surveys of characteristics and attitudes of financial aid directors taken in 1974, 1977, and 1981, and similar to the part of the 1984 CSS and NASFAA Survey of Undergraduate Need Analysis Policies, Practices and Procedures (SUNAPP) that examined the characteristics of financial aid directors. Unfortunately, there are enough differences in the WASFAA survey to preclude valid comparisons with the previous surveys. All of the NASFAA studies are national level, and reflect characteristics of financial aid directors only.

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(The 1981 NASFAA study also includes responses from associate and assistant directors and financial aid counselors or advisors.) The WASFAA survey covers only those institutions in the WASFAA region, and deals with characteristics and attitudes of all financial aid office employees.

Two data collection documents were used in the survey. The first was a census form completed by one person in each office including a description of employees by gender, ethnicity, and job level. The second was a questionnaire completed by each employee that asked questions about that individual's career path, educational attainment, level of financial aid training, and perceived need for additional training. The data from this questionnaire reflects responses of employees who stated that they devote at least 60 percent of their job time to the administration of student financial aid.

Survey packets were sent to 1,049 institutions in the WASFAA region, and 343 institutions responded, for a response rate of 32.7 percent (excluding proprietary institutions, the response rate was 53.6 percent). Because of this relatively low rate of response and because response varied by state and by type of institution, the results should be generalized very carefully to the larger population of all WASFAA financial aid office employees.

Characteristics of Financial Aid Office Employees

Ethnic Composition

Almost two-thirds of the 1,948 WASFAA financial aid employees represented in the survey were White, a little over one-eighth were Black, and a little over one-tenth were Hispanic (Table 1). Only 99 Asian employees were reported, comprising 5.1 percent of the total, along with 33 Filipinos, 31 Native Americans, 20 Pacific Islanders, and 16 employees who designated themselves as "Other." (For statistical purposes, Filipino, Native American, Pacific Islanders, and "Other" respondents were grouped under the title of "Other.")

Table 2 shows the ethnic distribution of WASFAA financial aid office employees in the survey by four "job levels": clerical, technical, professional, and management. Examples of duties associated with each of these job levels were given on the survey documents. There were proportionally more White employees at the management level in responding WASFAA financial aid offices, and proportionally more Black and Hispanic employees at the clerical level. While numbers of White financial aid employees dominated at each job level and were spread fairly evenly across job levels, numbers of employees in each of the other ethnic categories generally declined from the clerical level to the management level. White employees comprised 65.5 percent of all employees, and 74.7 percent of management; Black, Hispanic, and Asian employees comprised 13.1 percent, 11.2 percent, and 5.1 percent of all employees, respectively, but only 7.7 percent, 10.6 percent and 2.3 percent of management.

The ethnic composition of responding WASFAA financial aid office employees also varied somewhat by type of institution. Public community colleges had the highest proportion of Hispanic employees at 16.7 percent; public four-year, the highest proportion of Black employees at 15.4 percent; independent four-year institutions, the highest proportion of White employees at 74.4 percent; and proprietary institutions, the highest proportion of "Other" employees, including Filipinos, Native Americans, and Pacific Islanders, at 7.8 percent. The percentage of Asian employees was relatively constant across all segments.

Gender Composition

Financial aid office employees reported in the survey were predominantly women,

with 1,578, or 81 percent, of the 1,948 employees responding as female. This relationship existed across all ethnic groups, with Hispanic employees showing proportionally fewer women (72.6 percent) than any other ethnic group. Women employees outnumbered men employees at each job level, but the proportion of men increased at each higher job level. Table 3 shows that women employees were centered mainly at the clerical and technical levels, where they made up 94 percent and 89 percent of the work force, respectively.

At the professional and management level, women made up only 76 percent and 59 percent of the workforce. Correspondingly, men made up 24 percent and 41 percent of professional and management employees. Men comprised 19 percent of all WASFAA financial aid employees, but only 6 percent of clerical employees and 11 percent of technical employees. The proportion of male to female employees was constant across all segments, varying only from 16.9 percent in the public four-year schools to 23.1 percent at proprietary schools.

Job level

WASFAA financial aid employees identified in the survey were spread evenly across job types, with 20 percent at the management level. At public four-year institutions, only 13.4 percent of staff were in the management level, possibly due to larger average staff sizes; while in the proprietary segment, where staff sizes were smaller, 29.1 percent were indicated as being at the management level.

Career Paths of Financial Aid Office Employees

Academic Background

The survey data showed the highest academic achievement among Asian employees, male employees, and management level employees. Almost a quarter of Asian employees, 23.6 percent, reported having a Master's or Doctoral/professional degree, compared to 16.3 percent for all employees. Among men, 3.9 percent had Doctoral/professional degrees and 35.1 percent had Master's degrees, compared to only 0.8 percent and 9.1 percent for women.

Over 38 percent of management level personnel reported having a Master's or Doctoral/professional degree, which was much higher than the 19.8 percent reported by professional level staff (Table 4). Over 18 percent of clerical employees and more than 25 percent of technical employees reported having Bachelor's degrees, while very few employees in these groups reported having post-baccalaureate degrees.

Financial Aid Office Job History

Years of service in financial aid varied by job level. Nearly forty percent of management level staff had spent over ten years in the profession, but this percentage diminished rapidly by job level, with only three percent of clerical employees indicating tenure of over ten years. Nearly three out of ten men (28.2 percent) had been in the profession over ten years, compared to 15.6 percent for women and 18.3 percent of all employees. Among the segments, those employees at public four-year institutions showed the most years of service in financial aid.

Over ten percent of management personnel had worked in at least three different financial aid offices, and almost half had worked in more than one office; only one-third of professional level staff had worked in more than one office. Over ten percent of men had worked in three or more offices, compared to only about three percent for women. Independent and proprietary staff reported working in more offices than staff at public institutions, and Black employees reported working in more offices than other public ethnic groups.

About three-fourths of management level personnel indicated that they were pro-

moted from lower job levels, as did about half of technical level staff and professional level staff (Table 5). Among men, one-fifth started at the management level, while less than four percent of women did so; conversely, well over half of the women started at the clerical level, compared to only about one-fifth of the men. Among White employees, 7.8 percent started as managers, compared to about 6 percent for Black and Hispanic employees, 4 percent for Asian employees, and 5 percent for "Other" employees (Table 6). Less than three percent of employees at public four-year institutions started as managers, (compared to seven percent overall) probably owing to larger average staff sizes.

Salary Levels

As expected, the survey showed significant differences in salaries among WASFAA financial aid office employees at different job levels and in different school segments. Nearly ten percent of management level employees reported they earned \$40,000 or more annually, and nearly one-fourth earned between \$30,000 and \$39,999 (Table 7). The median salary range for managers was between \$20,000 and \$29,999, with 43 percent falling in that interval. Less than five percent of professional level employees reported salaries of \$40,000 or more, and 85 percent of employees at this job level were evenly split between the intervals of \$13,000 to \$19,999 and \$10,000 to \$29,999. The majority (57 percent) of technical level employees reported incomes between \$13,000 and \$19,999, with over a third earning less than \$13,000, and about nine percent earning between \$20,000 and \$29,999. Slightly over half of clerical level employees reported annual incomes between \$13,000 and \$19,999, with 44 percent earning less than \$13,000 and only three percent earning \$20,000 or more.

WASFAA financial aid office employees at public four-year institutions had the highest salaries, with nearly half of them reporting earnings of \$20,000 or more, and over three percent of them reporting earnings of \$40,000 or more (Table 8). The lowest salaries were reported by employees at independent four-year and proprietary institutions. At independent institutions, less than one percent reported incomes of \$40,000 or more, and only 30 percent reported incomes of \$20,000 or more. At proprietary institutions, nearly a third of employees reported earning less than \$13,000 annually.

The disproportionate number of women in lower paying jobs caused their salary distribution to be much lower than that of men. Just one percent of women reported salaries of \$40,000 or more, compared to eight percent of men, and just five percent reported salaries of \$30,000 or more, compared to 28 percent for men. Over two-thirds of women had salaries under \$20,000, compared to less than 40 percent for men.

Training Activity

Conference and Workshop Attendance

Attendance at state-level and regional financial aid conferences varied significantly by job level, gender, and ethnicity. Over 30 percent of responding WASFAA financial aid office employees said that they attended conferences every year, and almost half said that they attended conferences every year or almost every year. At the management level, over half of the respondents indicated that they attended conferences each year, but this percentage drops off rapidly to 13.5 percent for clerical respondents. In fact over 60 percent of clerical respondents reported that they had never attended conferences, compared to only six percent for management staff. Over 40 percent of men attended conferences each year, compared to 28 percent of the women, and White employees attended conferences more than any other ethnic group, with over half attending often or each year.

Almost half of the total respondents said that they attended need analysis workshops every year or almost every year, with management level employees attending more frequently. Over two-thirds of management level staff said that they attended every year or almost every year, compared to 38 percent for technical level employees and 20 percent for clerical level employees. Almost 60 percent of clerical level employees said that they never attended need analysis workshops. Only 32 percent of employees of "Other" ethnicity indicated that they attended need analysis workshops every year or almost every year, compared to 49 percent for all employees.

Over two-thirds of the respondents felt that their conference attendance had a positive effect on their careers, but this percentage varied widely by job level, as did conference attendance. Of management level staff, 87 percent felt that conference attendance had a positive effect on their professional effectiveness, compared to 57 percent for technical staff and 49 percent for clerical staff. Eighteen percent of clerical staff and sixteen percent of technical staff felt that *not* attending conferences had a negative effect on their careers.

Most Effective Form of Training

Nearly two-thirds of the survey respondents felt that attending workshops was the most effective form of student financial aid training, while fewer than three out of ten (29 percent) thought that attendance at conference interest sessions was the most effective training. Only about five percent thought that workbooks were the most effective, and less than two percent thought that video cassettes were the most effective. There was no large variation in responses to this question by gender, ethnicity, or segment.

Need for Additional Training

The survey asked employees the degree to which they felt they could benefit from training in eight different areas of student financial aid administration. The eight areas were: communication skills, federal aid program regulations, internal operating procedures, personnel and operational management skills, fiscal management skills, information management skills, interpersonal skills, and counseling skills.

Responses to these eight questions were fairly uniform, with two-thirds to four-fifths of WASFAA financial aid office employees saying that they could benefit from training in each of the eight areas. In some of the areas, the degree to which employees thought they could benefit varied by ethnicity, gender, and job level, with job level being most closely related to employee perceptions. There were significant response differences between men and women in the areas of communication skills, federal regulations, interpersonal skills, and counseling, where substantially higher percentages of women indicated that they could benefit from training. A high percentage of Asian employees said that they could benefit from training in communication skills, and high percentages of Black and "Other" employees felt that they could benefit from training in the area of fiscal management skills. Finally, a high percentage of employees of "Other" ethnicities felt that they could benefit from training in the area of information management skills.

Summary

Over four-fifths of the WASFAA financial aid office staff members responding to this survey were women, and almost two-thirds were White. Black employees comprised about thirteen percent, Hispanic employees about eleven percent, Asian employees about five percent, Filipino and Native American employees each less

than two percent, and Pacific Islander and "Other" employees each about one percent. White employees were disproportionately represented at the management level, as were Black and Hispanic employees at the clerical level. Asian employees were well represented at the professional level, but under-represented in management. Fewer than one-fifth of WASFAA financial aid office employees who responded were men, but among managerial staff, over two-fifths were men. Women comprised 81 percent of all respondents, 94 percent of clerical help, and only 59 percent of managerial staff.

Public two-year institutions in the survey had the highest percentage of Hispanic employees, public four-year institutions had the highest percentage of Black employees, and independent institutions had the highest percentage of White employees.

The highest education attainment was shown among Asian employees, male employees, and managerial staff.

A strong relationship was shown between job level and

1. academic attainment
2. years worked in student financial aid, and
3. number of financial aid offices in which the employee had worked.

At each higher job level, increasing proportions of employees had Bachelor's degrees or post-baccalaureate degrees, had worked in student financial aid for many years, and had worked in other financial aid offices.

There appeared to be a strong progression of employees to higher ranking jobs. About half of technical and professional employees started at lower ranking jobs, as did about three quarters of management level employees.

Frequency of conference and workshop attendance was closely related to job level, and was generally regarded as being beneficial to an employee's career. The majority of survey respondents felt that workshop attendance was the most effective form of training, and nearly all of the remainder of the respondents felt that conference interest session attendance was the most effective training. There was little variation in the response to this question by gender or ethnicity. Responses to this question were probably affected to some degree by employees having experienced only one form of training.

For each of the eight skills and activities listed as areas for training, from two-thirds to four-fifths of respondents felt that they could benefit from such training. Substantially higher percentages of women than men indicated that they could benefit from training in the areas of communication skills, federal regulations, interpersonal skills, and counseling. A high percentage of Asian employees also said that they could benefit from training in communication skills, and high percentages of Black and "Other" employees felt that they could benefit from training in the area of fiscal management skills. Also, a high percentage of employees of "Other" ethnicities felt that they could benefit from training in the area of information management skills. Employee perceptions of beneficial training in most of the areas were directly related to job level.

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TABLE 1: ETHNIC COMPOSITION

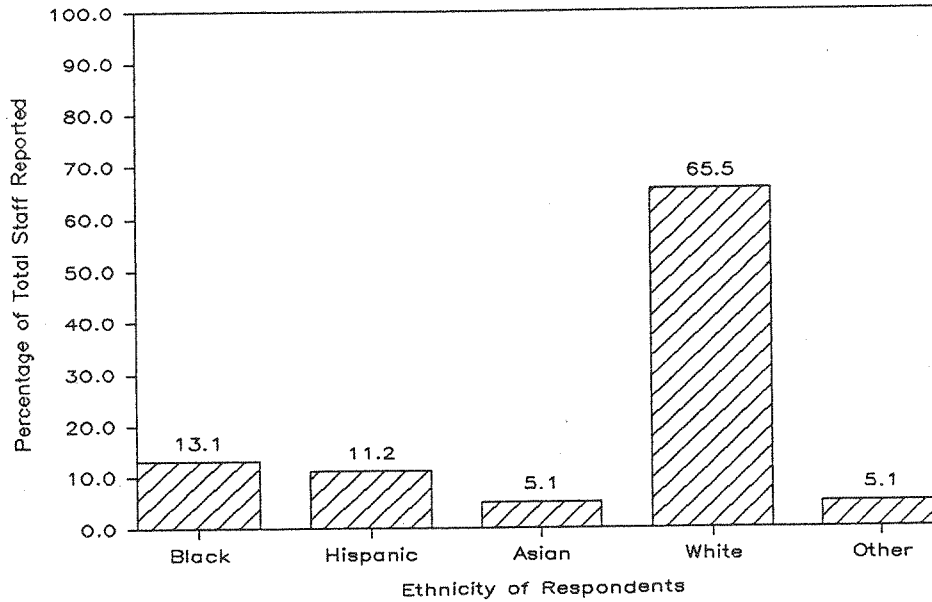


TABLE 2: RESPONDENTS BY ETHNICITY AND JOB LEVEL

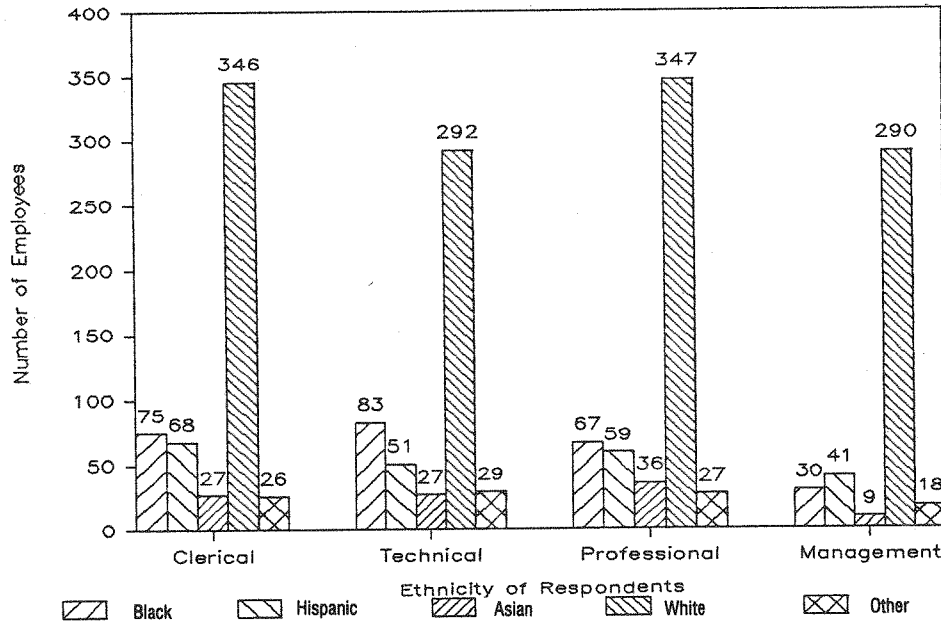


TABLE 3: RESPONDENTS BY GENDER AND JOB LEVEL

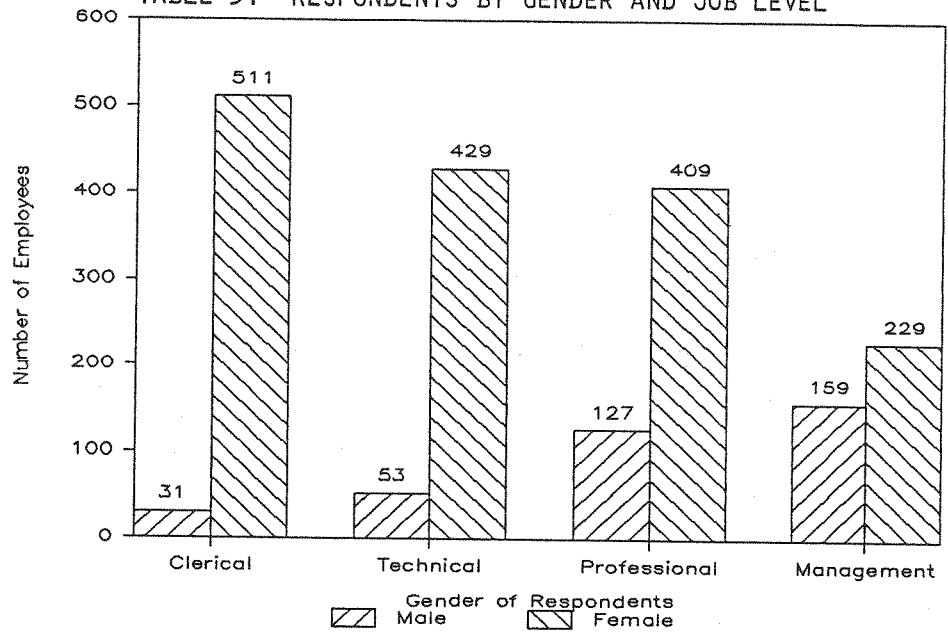


TABLE 4: ACADEMIC ACHIEVEMENT BY JOB LEVEL

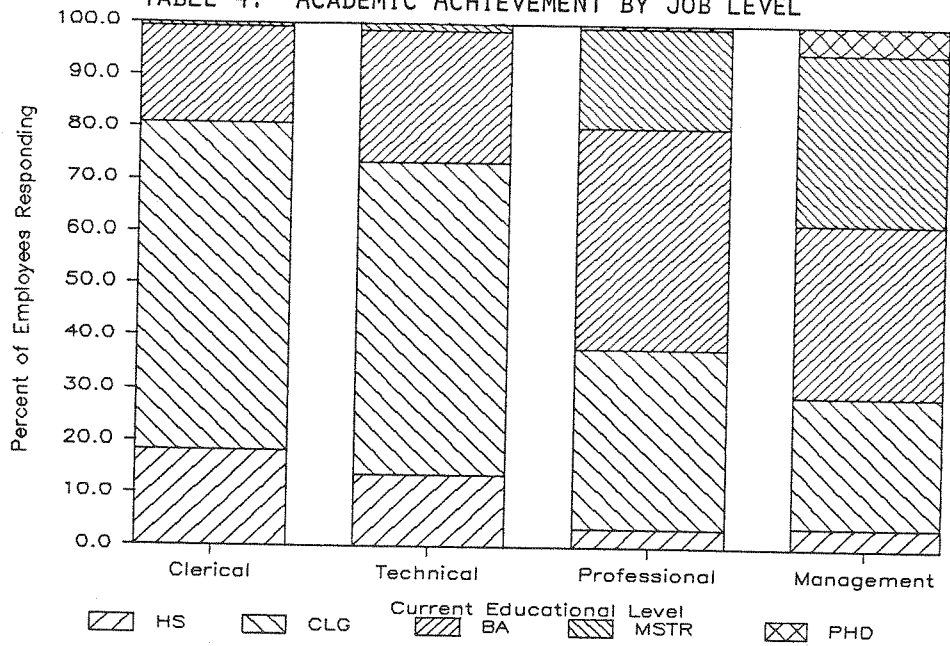


TABLE 5: ENTRY JOB LEVEL BY CURRENT LEVEL

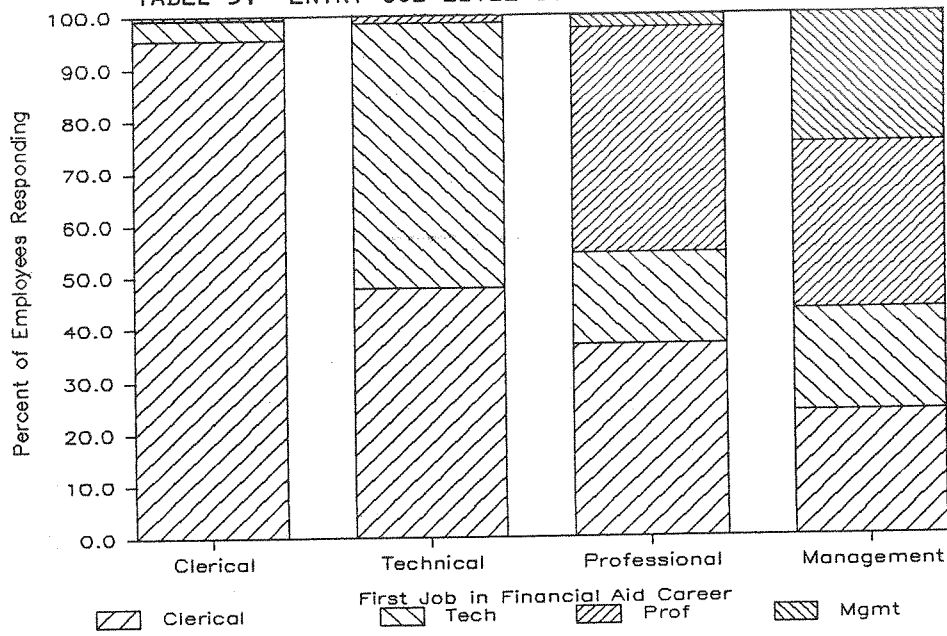


TABLE 6: ENTRY JOB LEVEL BY ETHNICITY AND GENDER

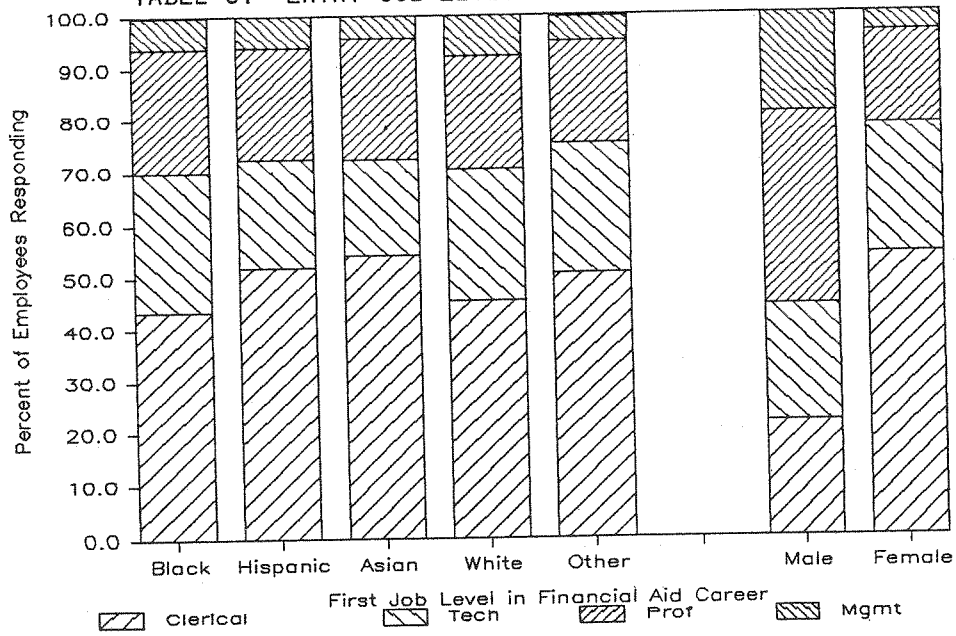


TABLE 7: SALARY BY JOB LEVEL

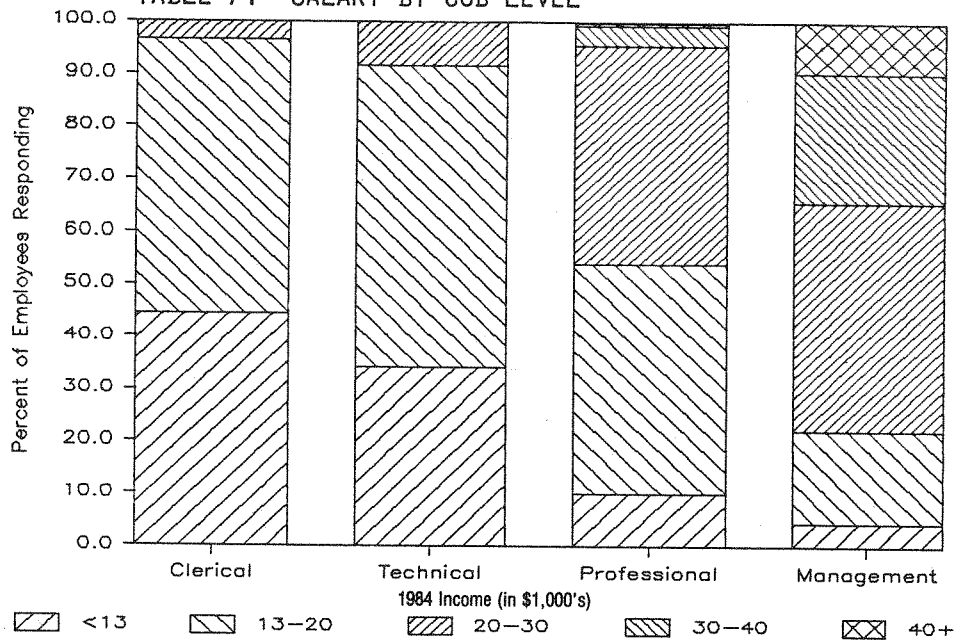


TABLE 8: SALARY BY TYPE OF INSTITUTION

